ShoreTel®

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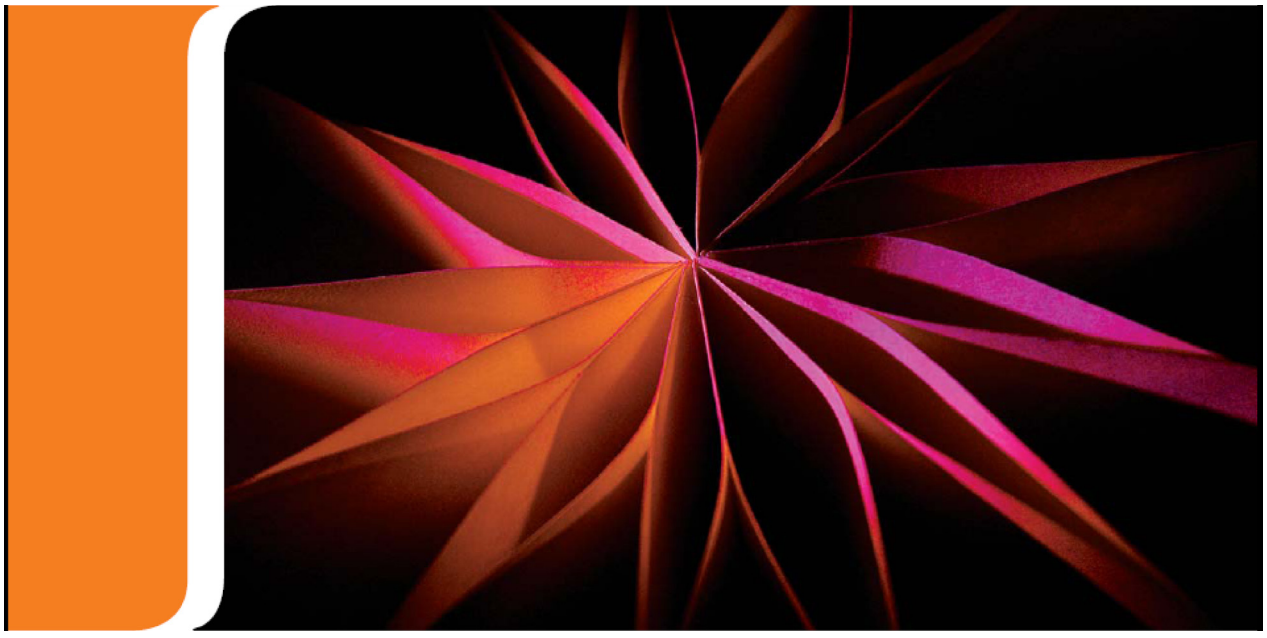
RoamAnywhere User's Guide: Nokia®

Rev. 1



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Contents

1 Installing the RoamAnywhere Client Application 1-1

Before You Begin 1-3
Setting Up a Wi-Fi Access Point on Your Mobile Device 1-4
Downloading and Installing the RoamAnywhere Client Application 1-6
Reprovisioning After Initial Installation 1-13
Updating to the Latest RoamAnywhere Client 1-14
Uninstalling RoamAnywhere Client 1-16

2 Getting Started 2-1

Starting and Accessing RoamAnywhere Client 2-2
Using the RoamAnywhere Client User Interface 2-3
Using RoamAnywhere Client in Multiple Countries 2-7
Exiting RoamAnywhere Client 2-8

3 Managing Calls 3-1

Receiving Calls 3-2
Placing Calls 3-4
Managing Personal Dial (Dual Persona™) Mode 3-7
Using Contacts and Log to Place Calls from RoamAnywhere Client 3-10
Using the Loudspeaker 3-11
Muting a Call 3-12
Switching Between Calls 3-13
Transferring Calls 3-14
Managing Conference Calls 3-16
Changing the Network Used While on an Active Call 3-18
Accessing Voice Mail 3-19
Making Emergency Calls 3-21

4 Presence and Instant Message 4-1

Presence Icons 4-3
Enabling Presence 4-6
Setting Presence 4-7
Setting Location 4-8
Editing the Presence Message 4-9
Adding and Deleting Buddies 4-10
Setting a Buddy's Access Level 4-13
Groups of Buddies 4-14
Using Instant Message 4-15
Viewing Buddy Details 4-24
Sorting the Buddy List 4-25
Logging In/Out 4-26
Sending Email to a Buddy 4-27
Transferring a Call to a Buddy 4-28

Conferencing with a Buddy 4-29
Calling a Buddy 4-30
Calling Voice Mail 4-32
Searching for a Buddy 4-33

5 Managing Secure Remote Access 5-1

Before You Begin 5-2
Verifying that Secure Remote Voice Is Enabled 5-3
Verifying that Secure Enterprise Services Are Enabled 5-3

6 Using Location Management 6-1

Verifying Secure Enterprise Services Availability 6-1
Adding Home Locations 6-1
Deleting Home Locations 6-3

7 Searching the Corporate Directory Using RoamAnywhere Client 7-1

Using the Corporate Directory outside of the Enterprise 7-2
Searching the Corporate Directory 7-2

8 Changing RoamAnywhere Client Preferences 8-1

Changing General Preferences 8-2
Changing Network Preferences 8-3
Changing Advanced Preferences 8-5
Changing Call Settings 8-8
Changing Presence Preferences 8-10
Uploading Logs to the ShoreTel Mobility Router 8-12

Preface

This guide is written for the user of the Nokia cellular phone, in combination with the ShoreTel Mobility Solution. This individual should have a basic understanding of the device's native system features and functionality in order to use this guide effectively.

The following procedures may vary slightly depending upon device type.

Documentation Overview

This guide is documented as described in the following sections.

Table P-1 In this Guide

Chapter	Description
1	"Installing the RoamAnywhere Client Application"
2	"Getting Started"
3	"Managing Calls"
4	"Presence and Instant Message"
5	"Managing Secure Remote Access"
6	"Using Location Management"
7	"Searching the Corporate Directory Using RoamAnywhere Client"
8	"Changing RoamAnywhere Client Preferences"

Documentation Conventions

This guide uses the following advisory notices:

IMPORTANT Indicates information that you need to pay special attention to.

NOTE Indicates supplementary information.

TIP Indicates a helpful tip.

This guide uses the following text conventions:

Convention	Usage
Bold text	Highlights user interface elements that you select on your mobile device or computer.
`Command text`	Specifies text that you type.
Italic text	Specifies variables that you need to replace, or highlights document titles or words with special emphasis.
Menu > Command	Specifies a menu item that you select.

Related Documentation

Publications in the RoamAnywhere solution documentation suite include the following:

- *ShoreTel Mobility Platform Support Guide*
- *ShoreTel Mobility Router Administrator's Guide*
- *ShoreTel Mobility Router 6000 Hardware Installation Guide*
- *ShoreTel Mobility Router 4000 Hardware Installation Guide*
- *ShoreTel Mobility Router 2000 Hardware Installation Guide*
- *ShoreTel Mobility Quick Reference Card: Features*
- *ShoreTel Mobility Quick Reference Card: Installation*

Online Knowledgebase

Access the ShoreTel online knowledgebase for additional information about the current release or to resolve issues with the ShoreTel system. This password-protected, online database is accessible to authorized contacts through the ShoreTel support site at http://support.shoretel.com.

1 Installing the RoamAnywhere Client Application

The ShoreTel RoamAnywhere Client application is designed to become the primary dialer interface after installation. You can make and receive calls using the mobile device's native dialing behavior, and have access to native Log, native Contacts, and advanced calling features such as Bluetooth, voice dialing, and speed dialing. The RoamAnywhere client extends key features of the enterprise PBX to enable you to make and receive calls as you would on the enterprise desk phone.

The RoamAnywhere Client:

- Transfers calls to your desk phone or another phone number.
- Originates ad-hoc conference calls.
- Accesses enterprise and cellular voice mail.
- Create seamless hand-off of calls between Wi-Fi and cellular networks
- Delivers enterprise-grade "mid-call" features to the Smartphones
- If configured by the system administrator, places and receives calls using Secure Remote Voice when connected to a remote Wi-Fi network. You can also use secure enterprise services when connected to a remote Wi-Fi network or cellular packet-data network if your system administrator has configured access for your account.

1 Installing the RoamAnywhere Client Application

This chapter provides instructions about how to install RoamAnywhere Client and contains the following sections:

- "Before You Begin" on page 1-3
- Setting Up a Wi-Fi Access Point on Your Mobile Device on page 4
- "Downloading and Installing the RoamAnywhere Client Application" on page 1-6
- "Reprovisioning After Initial Installation" on page 1-13
- "Updating to the Latest RoamAnywhere Client" on page 1-14
- "Uninstalling RoamAnywhere Client" on page 1-16

IMPORTANT The RoamAnywhere Client application can be installed only to a mobile device's memory. You cannot install RoamAnywhere Client on a microSD or other external memory card.

1.1 Before You Begin

Before you install RoamAnywhere Client, you will need:

- A data connection (Wi-Fi or cellular packet-data). For more information on Wi-Fi connections, see "Verifying Access Point Setup on Your Mobile Device" on page 1-3.
- If applicable, your credentials (used for authentication) for the Wi-Fi access point. (This information is necessary if you need to set up a Wi-Fi access point on your mobile device.)
- If applicable, security mode used by the access point (for example, WPA or WPA2)
- RoamAnywhere Mobility Router IP address, local or remote, or fully qualified domain name (FQDN).
- Username and password required for authentication with the Mobility Router.
- Enterprise phone number or extension. Contact your system administrator if you have questions about the information that you need for installation.
- A functioning SIM card is in the mobile device.
- The device's time, date and time zone must be set before provisioning RoamAnywhere Client.
- The RoamAnywhere Client supports provisioning the device in multiple languages, including English, French and Dutch. To select a language on the device, from the Home menu select **Setting > General > Personalization > Languages**. Select **Language for Telephone** and apply the appropriate language. Select **Yes** when prompted to reboot.

  NOTE On Nokia/Symbian OS, any Wi-Fi networks intended for Restricted mode users must be provisioned before installing the Client. This includes home or non-enterprise Wi-Fi networks for use in conjunction with Secure Remote Voice.

1.1.1 Verifying Access Point Setup on Your Mobile Device

To verify that a Wi-Fi access point in your enterprise network is set up on your mobile device:

1. Navigate to the **Access Points** area of your device.
2. Verify that at least one Wi-Fi access point in your enterprise network is in the list of access points.
3. If you do not know the name of a Wi-Fi access point in your enterprise network, contact your system administrator.
4. If no access points in your enterprise network are listed, you need to set up an access point on your mobile device. For more information, see "Setting Up a Wi-Fi Access Point on Your Mobile Device" on page 1-4.

1.2 Setting Up a Wi-Fi Access Point on Your Mobile Device

If you do not have a Wi-Fi access point already set up on your mobile device, you should set up at least one enterprise Wi-Fi access point before installing RoamAnywhere Client.

Before setting up a Wi-Fi access point on your mobile device, make sure that you have the following information:

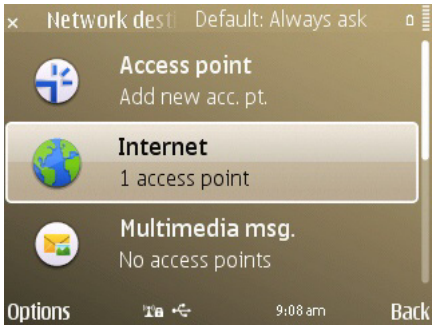
- Name of a Wi-Fi access point in your enterprise network
- Credentials for the Wi-Fi access point (used for authentication with the access point)
- Security mode used by the Wi-Fi access point (for example, WPA or WPA2)

To set up a Wi-Fi access point on your mobile device, use the following procedure. **For more information about setting up a Wi-Fi access point, see your mobile device's documentation**.

To set up a Wi-Fi access point on your mobile device

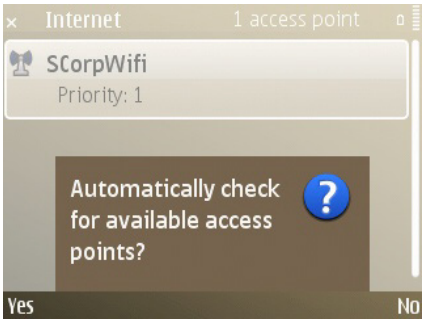
NOTE The following steps may vary depending on your device model.

1 Navigate to the **Access Points** area of your device.

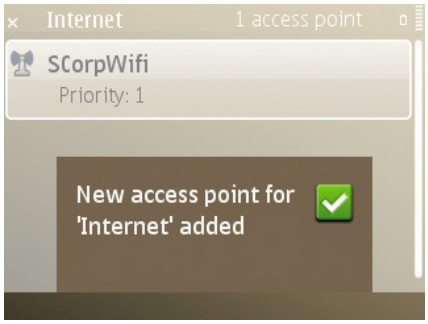


2 **Select Options > New Access Point**. The Access points screen appears.

3 Select **Yes**.



4 Select the **New Access Point**. The new access point is added.



5 Select the access point, **Options** and **Edit**.

6 Scroll to the Network Status field, and select one of the following:

- **Hidden**—To keep the network name from appearing when searching for access points, which means that you need to know the name of the WLAN to which you want to connect.
- **Public**—To display the network name when searching for access points.

7 Scroll to the **WLAN network mode** field and verify **Infrastructure** is selected.

8 Scroll to the **WLAN security mode** field and select or verify the security mode used by your Wi-Fi network.

9 The security settings fields that appear depend on the security mode of the enterprise's Wi-Fi network.

- If you are using a pre-shared key, make sure to enter the key in this screen.
- If you are using an Extensible Authentication Protocol (EAP) plug-in, select the EAP plug-in settings menu to enable and configure an appropriate plug-in. Refer to your enterprise settings for more configuration information.

10 Select **Back** until you return to the Menu screen.

11 Verify that the access point settings are correct by starting a Web browser to access a Web site.

12 When prompted, select the access point that you set up. If the page does not display correctly, check the access point settings.

1.3 Downloading and Installing the RoamAnywhere Client Application

The RoamAnywhere Client application is located on the Mobility Router.

NOTE Before downloading and installing RoamAnywhere Client, make sure that the mobile device's battery is at least 60% charged and that the device is in an area with good enterprise Wi-Fi coverage.

To download and install the RoamAnywhere Client:

1 On the mobile device, start a Web browser enter the URL of the Mobility Router in the following format:

`http://`*`Mobility-Router-address`*`/i`

where *Mobility-Router-address* is the IP address or fully qualified domain name of the Mobility Router (for example, http://10.11.12.13/i or http://sj.example.com/i).

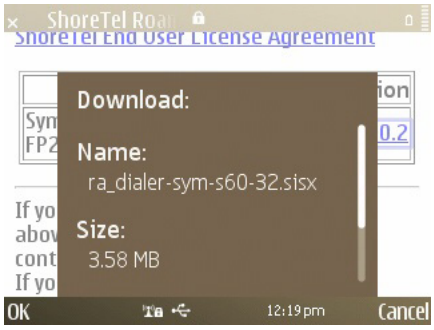
IMPORTANT If you are not accessing the Mobility Router as a local user, check with your Administrator for alternative ways to access and download the RoamAnywhere Client.

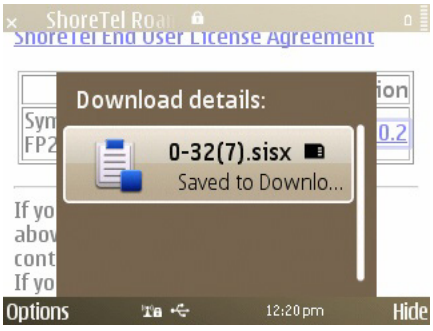
2 Do one of the following:

- If your mobile device is listed on the page, tap the version number link.
- If your mobile device is not listed on the page, tap the link on the page in the text below the table on the download page.

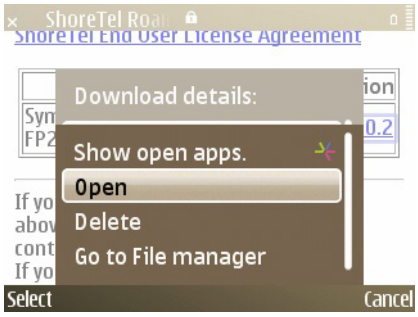
Symbian Series 60 3rd edition FP2
4.6.10.2
If your device's Mobile OS is listed above,click the version number to continue.
If your device's Mobile OS is not listed, click here to see the images for all supported Mobile OSs.
Options
12:12 pm
Back

3 Select OK. The image is downloaded to the native downloads directory on your mobile device. Select **Options**.

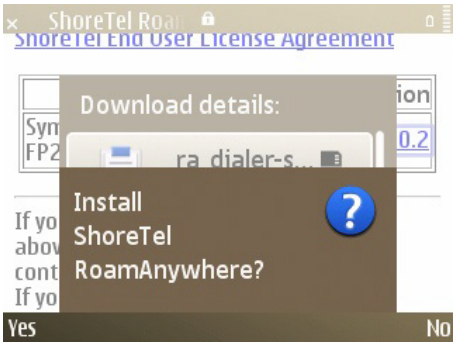




4 Verify the ShoreTel application is selected and choose **Open**.

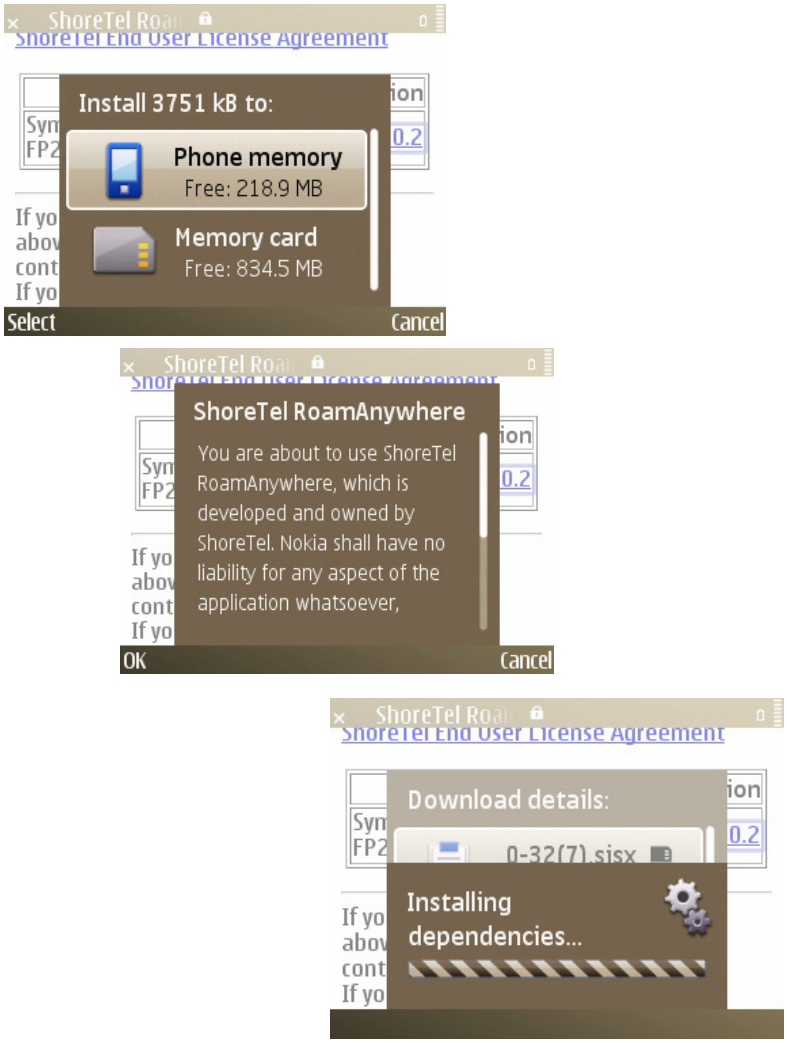


5 Select **Yes** to confirm the installation.



6 Verify the name of the application and select **Continue**.

7 Choose Phone memory and press Select. Read the disclaimer and select OK. The installation may take several minutes.



8 The device reboots. Launched the ShoreTel Client. Read the disclaimer and press **OK**. Press **OK** again to accept provisioning the RoamAnywhere Client.

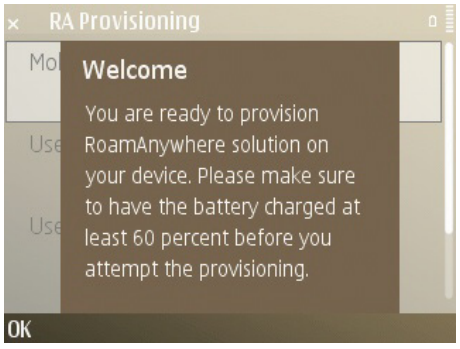
ShoreTel RoamAnywhere
Nokia Disclaimer
You are about to use ShoreTel RoamAnywhere, which is developed and owned by ShoreTel.
Nokia shall have no liability for any aspect of the application
OK
Cancel
ShoreTel RoamAnywhere
Notice
ShoreTel RoamAnywhere has not been provisioned. Do you want to provision it now?
OK
Cancel

9 Read the **Emergency Call Warning** message and select OK. If this warning is rejected, the Client exits.

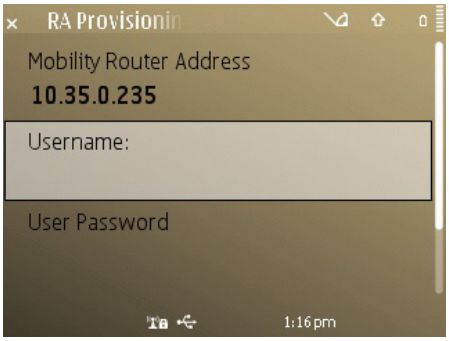
ShoreTel RoamAnywhere
Emergency Call Warning
USE OF THIS SOFTPHONE DURING AN EMERGENCY SITUATION IS NOT RECOMMENDED AND IS AT YOUR OWN RISK. This softphone application will route
OK
Cancel

NOTE Depending on how your device is pre-configured, some of the provisioning screens will not appear.

10 Read the message about the amount of charge of the battery for the mobile device, and select **OK** to provision the device. RoamAnywhere Client must be provisioned to be fully functional on the device.


RA Provisioning
Welcome
You are ready to provision RoamAnywhere solution on your device. Please make sure to have the battery charged at least 60 percent before you attempt the provisioning.
OK

11 In the **Mobility Router Address** field, type the internal/corporate IP address or fully qualified domain name (FQDN) of the RoamAnywhere Mobility Router.



An example of an IP address is 10.1.2.3, and an example of an FQDN is server1.example.com.

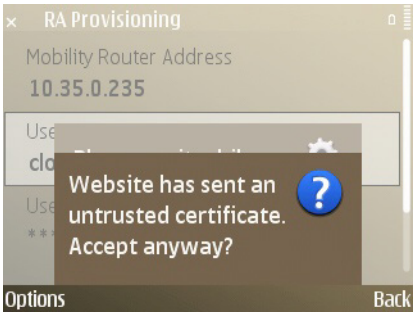
12 In the **Username** field, type your username. The username is usually the username you use to log in to your corporate network. If your system administrator has created a local user account for you on the Mobility Router, use that username from the administrator.

13 If you are a system administrator provisioning for an end-user, select **Option > Admin Provisioning** to enter the software's Admin provisioning mode. This mode displays fields for entering the admin username and admin password. Enter an administrator's credentials here to provision the phone on a user's behalf. Note that the admin user must be a Mobility Router admin user, i.e. a user listed as having admin capability on the Mobility Router's **Configuration > System > Authentication > Local Users** page. You can go back to User Provisioning mode by pressing **Options > User Provisioning**.

14 In the **User Password** field, type the password for your user account. If you entered your corporate username, enter the password you use to log in to the corporate network. If you entered a local username, enter the password for that user account. See your administrator for the password for the local user account.

15 If provisioning locally confirm that **Remote Provisioning** is set to **No**, select next and continue to the next step. If provisioning remotely set it to **Yes**, then input the **Remote Server Address** and **Remote Server Port** on the following screen.

16 If you are using a self-signed certificate on the RoamAnywhere Mobility Router, accept the untrusted certificate message. You have the option to temporarily or permanently accept the certificate, or not accept the certificate. Not accepting the certificate cancels the provisioning process.



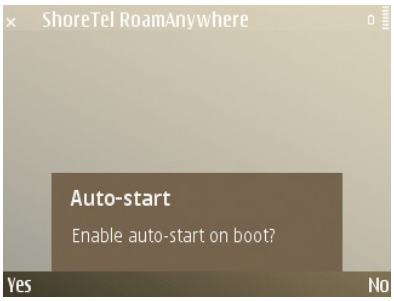
17 In the **Mobile Number** field, verify that your phone number is correct. If not, type the phone number of your mobile device. This is the cellular phone number, using all numbers and no special characters (for example, 4085551515).

NOTE You do not need to include the country code.

18 In the **Enterprise Full Number** field, type your the full 10-digit enterprise number.

19 In the **Enterprise Extension** field, type your enterprise extension, which is typically the internal extension of your enterprise phone number. The enterprise extension must be an extension of at least four digits. Type only digits, and do not use special characters (for example, 4442).

20 Select **Yes** to automatically start the RoamAnywhere client.



After the mobile device restarts, you might be prompted to assign a phone number for which you can directly access cellular voice mail. During the installation process, if this phone number cannot be obtained, you are prompted to provide one. If the number was obtained, you are not prompted.

You can change the preferred connection or add other wireless networks as preferred connections. For more information, see "Changing Network Preferences" on page 8-3.

1.3.1 Disconnecting from the Enterprise Wi-Fi Network

You can disconnect the device from the enterprise Wi-Fi network so that the device uses the cellular network to place and receive calls. From within the RoamAnywhere Client application, select **Options > Disconnect Wi-Fi**.

1.3.2 Connecting to the Enterprise Wi-Fi Network

If your mobile device is connected to the cellular network, you can connect the device to the enterprise Wi-Fi network so that the device uses the Wi-Fi network to place and receive calls if possible. From within the RoamAnywhere Client application, select **Options > Connect to Wi-Fi**. The VoIP registration icon displays on the device.

1.4 Reprovisioning After Initial Installation

After installing RoamAnywhere Client, you can reprovision the mobile device. You do not need to reprovision unless you get a new mobile device, or if your RoamAnywhere user account gets deleted from the Mobility Router.

The mobile device can be reprovisioned when connected to the enterprise Wi-Fi network.

If your RoamAnywhere user account is configured to access secure enterprise services, you can also provision while connected to a remote Wi-Fi network or a cellular packet-data network.

To reprovision the mobile device, from the RoamAnywhere Client main screen, select **Options > Reprovision**. Follow the initial installation procedure.

1.5 Updating to the Latest RoamAnywhere Client

RoamAnywhere Client is updated using the following methods:

- When your mobile device is connected to the enterprise Wi-Fi network or registered to use secure enterprise services, upon restart, RoamAnywhere Client automatically checks for any software updates on the Mobility Router.
- While connected to the network, the client periodically checks for updates.
- Manually checking for updates.

If there is a software update available for RoamAnywhere Client on the Mobility Router, you see a popup alerting you that an update is available.

NOTE When the upgrade alert is displayed, if you choose to cancel the upgrade, the alert does not display again until RoamAnywhere Client restarts.

IMPORTANT Upgrading from any version of ShoreTel Mobility prior to 4.6 for Apple iOS, RIM BlackBerry, or Nokia smartphones requires uninstalling the "Agito Networks RADialer" application from your mobile device before installing the 4.6 ShoreTel RoamAnywhere Client software. After installing the 4.6 ShoreTel RoamAnywhere Client, re-provision your device using your initial authentication credentials. This upgrade process is due to the re-branding of the application from Agito Networks to ShoreTel, and is only required once. Future upgrades to versions beyond 4.6 will not require uninstalling the old application version. Refer to "Uninstalling RoamAnywhere Client" on page 1-16 for information on how to uninstall the RoamAnywhere Client, then "Reprovisioning After Initial Installation" on page 1-13 for information about how to reprovision the device.

Depending on the version of RoamAnywhere Client that you have installed and what new RoamAnywhere Client version is available, you might be required to upgrade your version or choose whether to upgrade. If you are prompted to install a required upgrade, you must upgrade. If you do not, RoamAnywhere Client exits.

To get RoamAnywhere Client updates:

- If the prompt indicates that the upgrade is required, select one of the following:
  - **OK**—Upgrade to the latest software.
  - **Cancel**— You do not want to upgrade. RoamAnywhere Client exits. Every time that you start RoamAnywhere Client, you are prompted to upgrade. Until you upgrade the software, you cannot use RoamAnywhere Client.
- If the prompt indicates that the upgrade is recommended or asks whether you want to upgrade, select one of the following:
  - **Yes**—Upgrade to the latest software.
  - **No**—You do not want to upgrade. The current version of RoamAnywhere Client continues to be used until you upgrade.

RoamAnywhere Client is now installed on your mobile device, and a preferred access point has been configured for RoamAnywhere Client.

If you agreed to have RoamAnywhere Client start after installation, RoamAnywhere Client is running and active in the background.

You can also manually check for updates on the Mobility Router by selecting **Options > Check for updates**.

1.6 Uninstalling RoamAnywhere Client

To uninstall RoamAnywhere Client:

1. Navigate to your Applications.Press the **Menu** key.
2. Use the scroll key to navigate to the Applications, Installations, or Installat. icon, and select it.

   NOTE The icon you select depends on the model of your mobile device.
3. Depending on what you want to uninstall, scroll to RAClient.
4. Select **Options > Remove**.
5. Select **Yes** to confirm.

   The mobile device may need to be rebooted. RoamAnywhere Client has been uninstalled.

Getting Started 2

After installing RoamAnywhere Client, use it as the primary client interface on your mobile device to make and receive calls, and access to enterprise PBX features enabling you to use your mobile device as you would use your desk phone.

Before you start placing calls and configuring RoamAnywhere Client, read this chapter to familiarize yourself with how RoamAnywhere Client is integrated with your mobile device.

This chapter contains the following sections:

- "Starting and Accessing RoamAnywhere Client" on page 2-2
- "Using the RoamAnywhere Client User Interface" on page 2-3
- "Using RoamAnywhere Client in Multiple Countries" on page 2-7
- "Exiting RoamAnywhere Client" on page 2-8

2.1 Starting and Accessing RoamAnywhere Client

Start the ShoreTel Client if you chose not to automatically start it after installation.

- From the native home screen, select **Menu > Options > Show** open apps and select the ShoreTel client, or
- From the native home screen, select **Menu > Applications**, and select the ShoreTel client.

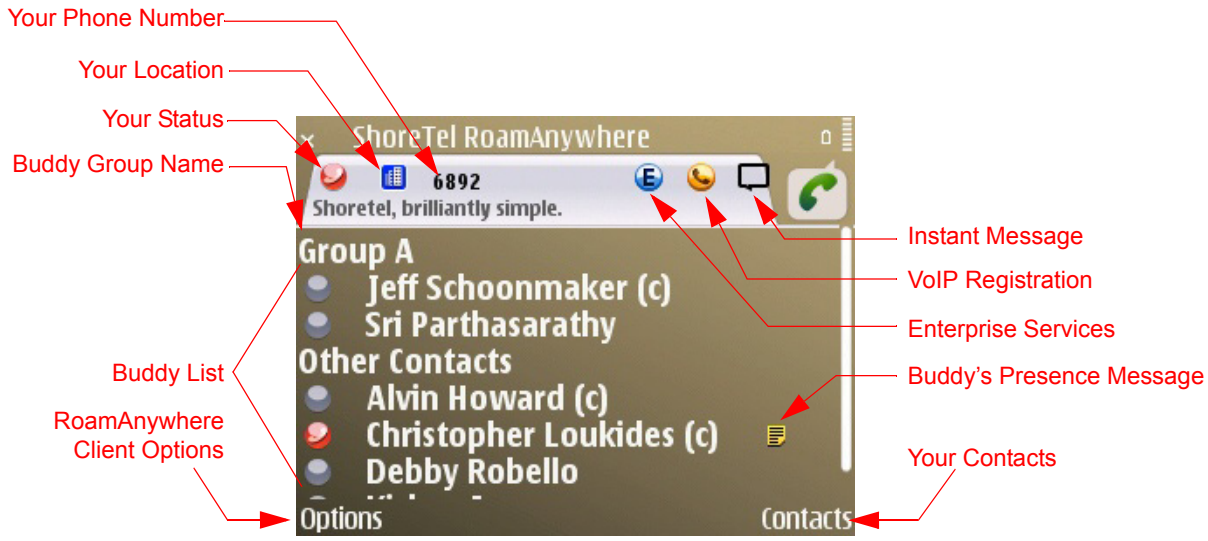
NOTE Use your mobile device's keys as you normally would. For information about your mobile device's keys, see the documentation for your mobile device.

2.1.1 Adding RoamAnywhere Client to Active Standby Mode Applications

You can add RoamAnywhere Client to the list of applications that are available in active standby mode. When you power on your mobile device, it enters active standby mode, and its screen shows application shortcuts that you can define. For more information, see the documentation for your mobile device.

2.2 Using the RoamAnywhere Client User Interface

The following are the components of the RoamAnywhere Client main screen.



- **Your phone number** —Internal extension of your enterprise phone number.
- **Your Location**—Displays your Location when Presence is enabled.
- **Your Status**—Displays your Status when Presence is enabled.
- **Buddy Group Name**—Displays the Group your Buddy/User ID is assigned to on the Server, when Presence is enabled.
- **Buddy List**—Displays your Buddies when Presence is enabled.
- **Instant Message**—Displays when Presence is enabled and if an Instant Message conversation is active.
- **VoIP registration icon**—Indicates that the mobile device is registered, allowing you to make and receive VoIP calls using the enterprise Wi-Fi network.

  NOTE The presence of the VoIP registration icon indicates that VoIP is available but does not guarantee that all calls are made and received using the Wi-Fi network. The RoamAnywhere solution determines whether to route a call using Wi-Fi or Cellular Data networks based on the signal strength of the enterprise Wi-Fi network and other parameters, even if VoIP is available.
- **Enterprise services icon**—Indicates that enterprise services are available for you to use on your mobile device.
- **Buddy's Presence Message**—Displays this Buddy's outgoing message, when Presence is enabled.

- **Buddy List—**Displays this Buddy's location, when Presence is enabled.
- **Contacts—**Your mobile device's contact list. For more information about Contacts, see your mobile device's documentation
- **Options menu—**Press the left selection key on the mobile device to see the following commands:
  - **Buddy List —**Add or delete Buddies.
  - **Sort Buddy List —**Change the order in which Buddies are displayed.
  - **Logout/Login —**Logout or Login to the ShoreTel Client.
  - **Preferences—**Set general, network, and advanced preferences for RoamAnywhere Client.
  - **Call Settings—**Define how calls to your enterprise phone number are routed to your mobile device.
  - **Personal Dial—**When enabled, allows you to place the next call directly over the cellular network, with the phone number of the SIM as the caller ID. This option toggles between **Business Dial** and **Personal Dial**.
  - **Voice Mail—**Access cellular and enterprise voice mail.
  - **Directory Query—**Search your corporate directory.
  - **Reprovision—**After initially installing RoamAnywhere Client, you must provision your device. You do not need to reprovision unless you get a new mobile device, or if your RoamAnywhere user account gets deleted from the Mobility Router.
  - **Check for updates—**When your mobile device is connected to the internet, you can check for RoamAnywhere Client software updates on the Mobility Router.
  - **Set Home Location—**Specify a Wi-Fi network outside of the enterprise as a home location.
  - **Manual SIM Swap—** In some instances, it may be necessary to update the RoamAnywhere Mobility Router with the device's phone number, operator and IMSI information before swapping the SIM card.
  - **About—**Get version information about RoamAnywhere Client.
  - **Help—**Access help about RoamAnywhere Client.
  - **Exit—**Exit RoamAnywhere Client.

Table 2-1 lists the RoamAnywhere Client icons.

Table 2-1 RoamAnywhere Client Icons

Icon	Name	Description
	RoamAnywhere Client	RoamAnywhere Client main icon.
	VoIP Registration	Mobile device is registered, allowing you to make and receive VoIP calls using the enterprise Wi-Fi network.
	Enterprise Services	Mobile device is able to use Enterprise Services, such as directory query.
	Wi-Fi network	Indicates the call is on the Wi-Fi network.
	Cellular network	Indicates the call is on the cellular network.
	Cellular network call	Indicates an outgoing or incoming call is routed directly over the cellular network without going through the business/enterprise (for example, a call is placed with Personal Dial enabled. Personal Dial not supported on iPhone).
	Conference call	Indicates a conference call is active.
	Forwarding	Indicates that call forwarding is enabled.
	Do Not Disturb	Indicates that Do Not Disturb (DND) is enabled.
	Voice mail	Indicates an enterprise voice mail message.
	Secure VoIP Registration	Secure Remote Voice is enabled. Mobile device is registered, allowing you to securely make and receive VoIP calls using the remote Wi-Fi network.
	Secure Enterprise Services	Mobile device is able to use Secure Enterprise Services (SES), such as directory query, home locations, and voice mail indicator.

Table 2-1 RoamAnywhere Client Icons *(continued)*

Icon	Name	Description
	Outgoing call placed	Indicates that you are placing a call.
	Outgoing call connected	Indicates that an outgoing call has been connected.
	Hold	Indicates that a call is on hold.
	Incoming call	Indicates that a call is coming in.
	Mute	Indicates that a cellular call has been muted.
	Volume	Shows the volume level for the call.

2.3 Using RoamAnywhere Client in Multiple Countries

When traveling between countries, it is common to exchange SIM cards to reduce the cost of making or receiving calls. Using the "Configure" feature, the RoamAnywhere Client transparently routes these calls. This feature allows automatic remapping of the cellular number on the RoamAnywhere Mobility Router when a new IMSI is detected, and is available as a "Secure Enterprise Service" over WLAN or cell packet data. Reprovisioning the RoamAnywhere Client is unnecessary, and the feature is always "on" (user configuration is unnecessary).

NOTE If users enable call forwarding on mobile devices using prepaid SIM cards, calls in the enterprise are directed to voice mail because call forwarding is not supported on these SIM cards (due to a limitation of the wireless carrier prepaid service).

To configure the device after exchanging the SIM card:

1. Read the message in the device window regarding the exchange of SIM cards.
2. Tap the right button. The device communicates with the RoamAnywhere Router and reconfigures the device. If the configuration is successful, a success message appears. If the configuration is unsuccessful, retry the right Configuration button.

To reprovision the device after exchanging the SIM card:

1. Read the message in the device window regarding the exchange of SIM cards.
2. Tap the left button. Refer to "Reprovisioning After Initial Installation" on page 1-13 for instructions on reprovisioning the device.

2.3.1 Manual SIM SWAP

In some instances, it may be necessary to update the RoamAnywhere Mobility Router with the device's phone number, operator and IMSI information before swapping the SIM card.

To manually enter this information before the SIM card is replaced:

1. Select **Applications > RA Client > Options > Manual SIM Swap**.
2. Enter the number of the mobile device.
3. Enter the mobile operator information.
4. Enter the IMSI (International Mobile Subscriber Identity) information, including MCC and MNC.
5. Select **OK** to save changes.

2.4 Exiting RoamAnywhere Client

To exit RoamAnywhere Client:

1 Select **Options > Exit**.

RoamAnywhere Client is no longer running in the background. Any calls that you place are made using the mobile device's dialer and the cellular network. Any calls that you receive are also on the cellular network. Restricted mode users can not exit the RoamAnywhere Client.

3 Managing Calls

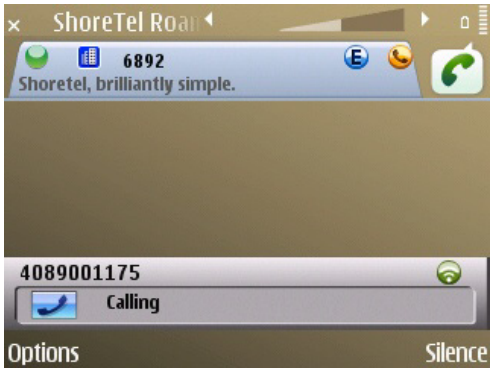
Using the RoamAnywhere Client, calls are managed the same way they are managed using the native device dialer. For example, you can put a call on hold and take another call, switch between active calls, transfer calls to another number or your desk phone, access enterprise and cellular voice mail, and make ad-hoc conference calls.

This chapter contains the following sections:

- "Receiving Calls" on page 3-2
- "Placing Calls" on page 3-4
- "Ending an Active Call" on page 3-6
- "Managing Personal Dial (Dual PersonaTM) Mode" on page 3-7
- "Using Contacts and Log to Place Calls from RoamAnywhere Client" on page 3-10
- "Using the Loudspeaker" on page 3-11
- "Muting a Call" on page 3-12
- "Switching Between Calls" on page 3-13
- "Transferring Calls" on page 3-14
- "Managing Conference Calls" on page 3-16
- "Changing the Network Used While on an Active Call" on page 3-18
- "Accessing Voice Mail" on page 3-19
- "Making Emergency Calls" on page 3-21

3.1 Receiving Calls

The RoamAnywhere Client icon displays when there is an incoming call. In addition, an icon indicating whether the call is a VoIP or cellular call displays, as well as the mid-call options available when the RoamAnywhere Client is enabled. These options may vary from the native dialer options.



The following options are available for an incoming call:

- Answer—Press the **Call** key.
  - Also, select **Options > Answer** to answer a call.
- Decline—Press the **End** key.
  - Also, select **Options > Decline** to decline a call.

The phone screen becomes active when the call is answered.

3.1.1 Accepting or Declining a Call While on Another Call

While on a call, the screen and call waiting tone indicate that there is another incoming call.

- To answer the incoming call press the Call key. The first call is put on hold and the incoming call becomes the active call. For information about switching between calls see “Switching Between Calls” on page 3-13.
- To Decline the incoming call press the End key.

  NOTE If you are on a Wi-Fi call and receive a cellular call, the cellular call is routed to your cellular phone’s voicemail.

3.2 Placing Calls

To make calls using RoamAnywhere Client rather than your mobile device's client, make sure that RoamAnywhere Client is running. For information about starting RoamAnywhere Client, see "Starting and Accessing RoamAnywhere Client" on page 2-2.

> **NOTE** To make calls using RoamAnywhere Client, you do not need to have the RoamAnywhere Client main screen active; RoamAnywhere Client needs only to be running.

To make a call with the ShoreTel Client, launch the Client and proceed as you normally would to make a call. You can also use the Client's Contacts and Log lists to make calls.

If you are using RoamAnywhere Client to make a call over the cellular network, the call is initially routed to the enterprise before being placed to the number you are calling. Refer to "Changing Network Preferences" on page 8-3 for information on selecting the cellular network.

The following types of calls are not routed through the enterprise:

- Emergency calls (for example, 911 in the United States or 112 in European Union countries).
- Direct call number defined in the Mobility Router's dial plan (for example, 411).
- Calls with numbers starting with an asterisk (*) or the pound sign (#) (for example, *646# to check remaining cellular plan minutes).
- Personal Dial calls (calls placed with Personal Dial mode enabled).
- Calls to cellular voice mail.

To make a call:

1. In standby mode or with the RoamAnywhere Client main screen active, enter the phone number.

   > **NOTE** When placing a call to a phone number that is not an enterprise phone number, make sure that the number includes the area code if it is different from the default area code of the enterprise PBX. Contact your system administrator if you do not know the area code for the enterprise PBX. When making a call to an enterprise extension, you do not need to include an area code.
   >
   > If the mobile device was in standby mode when you dialed the phone number, the RoamAnywhere main screen appears.

2. Press the **Call** key. The call is placed.

If you are on a call and the call is handed over from the enterprise Wi-Fi network to the cellular network, you might notice that the RoamAnywhere Client user interface disappears briefly before appearing after the handover to the cellular network.

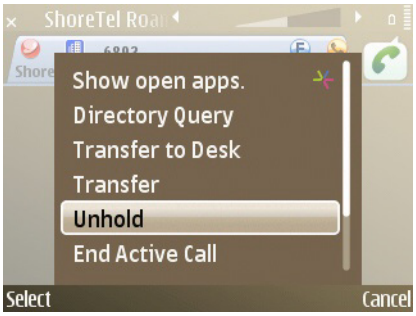
3.2.1 Placing an Active Call on Hold

To place a call on hold:

- From RoamAnywhere Client, select **Options > Hold**.

To take a call out of Hold mode:

- From RoamAnywhere Client, select **Options > Unhold**.



NOTE After the call is handed over to the cellular network, the call is put on hold.

3.2.2 Placing a Call While on an Active Call

You can make another call while on an active call by doing the following:

1 Select **Options > New Call**.

2 Enter the new number and select **Call**. The first call is automatically put on hold.

NOTE If you are on a call using the enterprise network and enter a direct call number as defined in the Mobility Router's dial plan (for example, 411) or a phone number that starts with an asterisk (*) or pound sign (#), the call on the enterprise network is dropped.

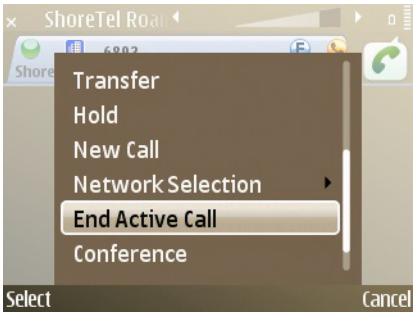
Calls to non-routable three-digit numbers (such as 911, 411, N11) or numbers starting with an asterisk or pound sign are placed directly using the cellular network and not routed through RoamAnywhere Client. You cannot simultaneously have an enterprise network call and a call routed directly through the cellular carrier's network on the mobile device.

If you have an active call and a call on hold, you can switch between the calls. For more information about switching between active calls, see "Switching Between Calls" on page 3-13.

3.2.3 Ending an Active Call

End an active call by doing one of the following:

- Press the **End** key or select **Options > End Active Call**.



If you have one active call and another on hold, select **Options > End All Calls** to end both calls.

3.3 Managing Personal Dial (Dual Persona™) Mode

By default, when you place a call with your mobile device while running RoamAnywhere Client, the call is routed through the enterprise (**Business Dial** is enabled), and the caller ID for your mobile device is your enterprise phone number. Calls routed through the enterprise give you access to one enterprise phone number, enterprise PBX features, and other features such as conference calling and transfer-to-desk-functionality.

There might be occasions on which you want to place a call that is not routed through the enterprise and uses the phone number of the SIM card of your mobile device.

The RoamAnywhere Client supports the Dual Persona feature, enabling **Personal Dial** mode. This feature allows you to place calls directly over the cellular network (not routed through the enterprise) and use the phone number associated with the SIM card of your mobile device as the caller ID. This allows you to switch between using your mobile device for personal use and for business without exiting the RoamAnywhere Client application.

For example, if your enterprise phone number is 919-8000, this number is used as the caller ID when you make phone calls that are used in **Business Dial** mode. If the phone number of your SIM card is 555-4442, when you place a call with **Personal Dial** enabled, the caller ID used is 555-4442, and the call is directly placed over the cellular network.

NOTE When you enable **Personal Dial** mode, it stays in effect until **Business Dial** mode is selected.

3.3.1 Enabling/Disabling Personal Dial

By default, Business Dial is enabled and Personal Dial mode is disabled. To enable Personal Dial mode, select **Options > Set Personal Dial**. The personal icon appears on the screen to indicate that Personal Dial is enabled.

After enabling **Personal Dial** mode, place a call as you normally do with RoamAnywhere Client.

To disable **Personal Dial** and return to **Business Dial** mode select **Options > Set Business Dial**..

3.3.2 Creating the ShoreTel Personal Group

If there are people that you call often with Personal Dial mode enabled, you can add these contacts to a group named ShoreTel Personal. The ShoreTel Personal group is accessible as one of the groups in Contacts. When you call anyone in the ShoreTel Personal group, the call is always placed with Personal Dial mode enabled.

To create a personal group:

1. Select **Options > Create Personal Group**.
2. Select one of the following at the add contact to group prompt:
   - **Yes**—Select if you want to start adding contacts to the ShoreTel Personal group. For information about adding contacts to the ShoreTel Personal group, see "Adding Contacts to the ShoreTel Personal Group" on page 3-8.
   - **No**—Select if you do not want to start adding contacts to the ShoreTel Personal group. The ShoreTel Personal group is created. You can add contacts to the ShoreTel Personal group later. See "Adding Contacts to the ShoreTel Personal Group" on page 3-8.

3.3.3 Adding Contacts to the ShoreTel Personal Group

After creating the ShoreTel Personal group, you can add contacts to the group. When you place a call to any contact in the ShoreTel Personal group, it is placed

3.3.4 Deleting the ShoreTel Personal Group

You can delete the ShoreTel Personal group. If you delete this group, if you call any contacts that were members of the group, the calls are not considered personal-mode calls.

To delete the ShoreTel Personal group:

1. From the RoamAnywhere Client main screen, select **Contacts**.
2. Scroll to the groups tab.
3. Navigate to ShoreTel Personal.
4. Select **Options > Delete**.
5. At the confirmation prompt, select **Yes** to delete the group. The group is deleted.

3.4 Using Contacts and Log to Place Calls from RoamAnywhere Client

You can use the Contacts and Log on your mobile device in conjunction with ShoreTel Client with or without a SIM card. You can also still make emergency calls if there is no SIM card in the mobile device, provided that your cellular carrier supports this functionality.

You must have a SIM card in the mobile device to make calls over the cellular network. If your mobile device does not have a SIM card, you make calls using the enterprise Wi-Fi network if you dial the number from within the RoamAnywhere Client main screen.

3.4.1 Using Contacts to Place Calls

From the RoamAnywhere Client main screen, press the right selection key to select Contacts. Select the name of the contact and then select the **Call** button.

3.4.2 Using Log to Place Calls

From the RoamAnywhere Client, select **Call** to view the log list and select the contact.

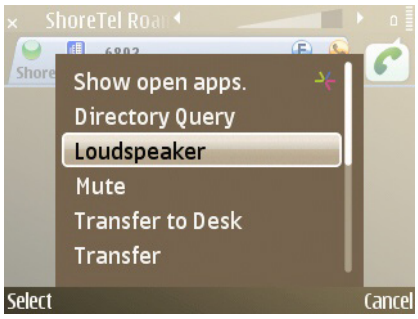
3.5 Using the Loudspeaker

While you are on an active call, select loudspeaker to use the phone in hands-free mode.

IMPORTANT Do not hold the mobile device to your ear while the loudspeaker is activated.

To activate the loudspeaker:

- From RoamAnywhere Client, select **Options > Loudspeaker**.



To deactivate the loudspeaker:

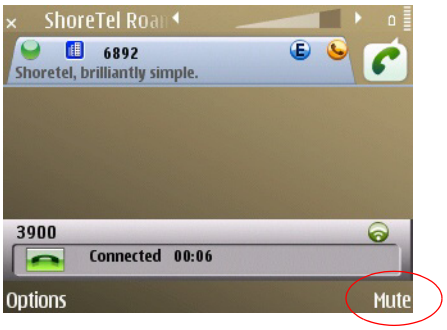
- From RoamAnywhere Client, select **Options > Handset**.

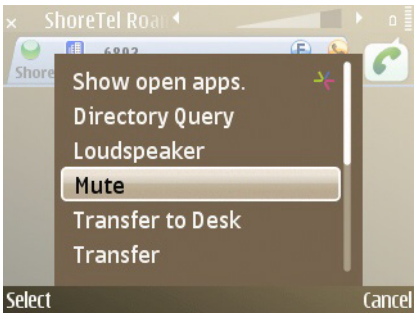
3.6 Muting a Call

While you are on an active call, you can mute your line so that the other party cannot hear you.

To mute a call:

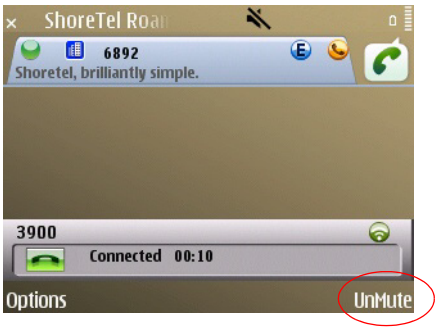
- Within RoamAnywhere Client, select the **Mute** button or select **Options > Mute**.

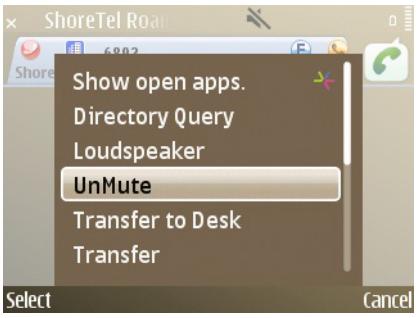




To unmute a call:

- Within RoamAnywhere Client, select the **UnMute** button or select **Options > UnMute**.



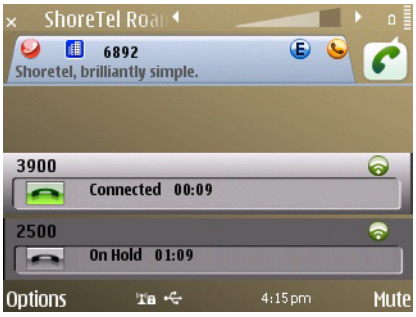


3.7 Switching Between Calls

If you have one active call and one call on hold, you can switch between the calls.

To switch between calls:

- Select **Options > Swap**. The call that was active is put on hold, and the other call is now active.



If you have one active call and one call on hold and move out of range of the enterprise Wi-Fi network, when the handoff from the wireless to cellular network occurs, the call that is on hold is dropped.

3.8 Transferring Calls

While you are on an active call on your mobile device, use the Transfer function to transfer the call to a specified phone number or to your desk phone.

NOTE Transferring a call that is on the cellular network takes longer than transferring on the enterprise Wi-Fi network. A cellular transfer dials out a second call using the cellular network.

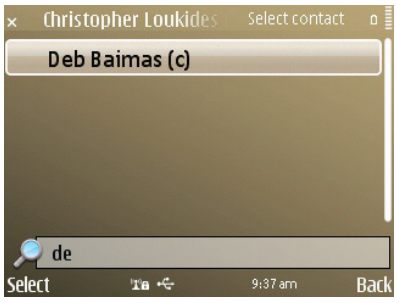
By default, transferring a call to your desk phone transfers to your enterprise extension. For more information, see "Changing Call Settings" on page 8-8.

3.8.1 Transferring Calls to a Specified Contact

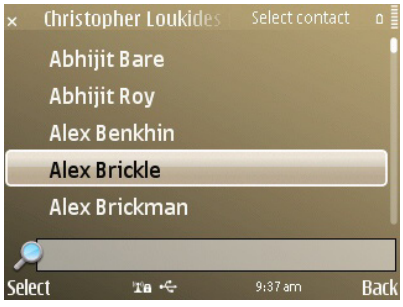
1 Select **Options > Transfer**. The active call is put on hold.

2 Do one of the following:

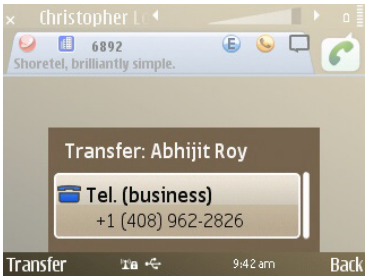
- In the Phone Number box, enter the phone number or first few letters of the person's name to receive the transfer, or



- Select **Find** and navigate to the contact.



3 Choose **Select** on the desired contact. The contact's name and phone number appear.



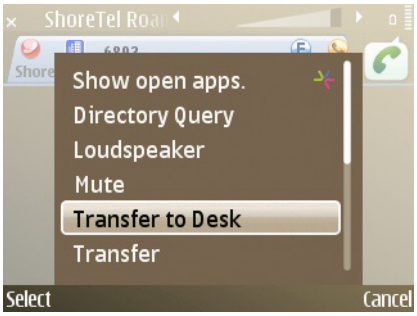
4 Select **Transfer**. The call is transferred to the number that you specified.

3.8.2 Transferring Calls to Your Desk Phone

By default, when you transfer a call to your desk phone, the call is transferred to your enterprise extension, which is set in the Call Settings screen. If the PBX for your enterprise uses a phone number other than your extension to transfer active calls to your desk phone, you can specify that number in the Call Settings screen. For more information, see "Changing Call Settings" on page 8-8.

While on an active call, to transfer a call to your desk phone:

1 Select **Options > Transfer To Desk**. The call is transferred to your desk.



3.9 Managing Conference Calls

You can use RoamAnywhere Client to initiate an ad-hoc conference call with two other people. When you originate a conference call, the calls you place to other conference call members must be routed through the enterprise. If you place a call directly over the cellular network, that call cannot be part of a conference call.

Conference calls can be originated while connected to the enterprise Wi-Fi network or using the cellular network, as long as the outgoing calls are routed through the enterprise, as well as using Secure Remote Voice.

To make a conference call:

1 Place a call to one of the conference call members.

2 While the call is active, select **Options > Conference**. The call is placed on hold.

NOTE You can originate a conference call only if you use one of the Options > Conference options to place the call to the third participant in the conference call. You cannot initiate a new call to the third participant while the second participant is on hold and establish a conference call with the two parties.

3 Do one of the following:

A In the Phone Number box, enter a phone number.

1. Enter the phone number of the other conference-call member.

2. Press the Call key.
3. Go to Step 4.

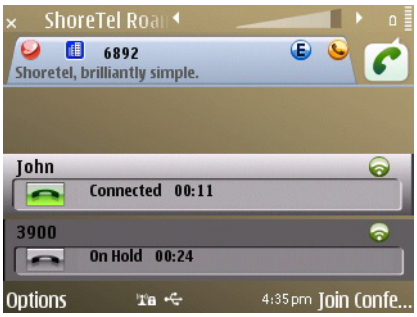
B Select **Find**.

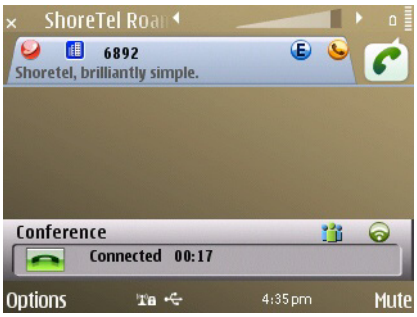
1 Navigate to the contact you want to call.

2. Choose **Select**. The contact name and phone number appear.

3. To call the contact, select the number you want from the list and choose **Conference** with the left button.

4 After the caller answers, select **Join Conference**. The first call that you placed is now active, and the two people that you called are now on a conference call. You see the conference icon on the screen, indicating that all conference call members are connected. Press **Cancel** to return to the previous call.





NOTE While on a conference call, you cannot transfer the call from your mobile device to your desk phone. Any of the conference call participants using a mobile device running RoamAnywhere Client can transfer the call to a desk phone.

3.10 Changing the Network Used While on an Active Call

The default network used to place and receive calls is set using the Network Preferences tab. Refer to "Changing Network Preferences" on page 8-3 for more information.

If you change the network from Wi-Fi to cellular, the RoamAnywhere Client main screen disappears while the call is handed over from the wireless network to the cellular network. When the call is handed over to the cellular network, the RoamAnywhere Client main screen appears.

To change the network while on an active call:

1. Select **Options > Network Selection**.
2. Select one of the following:
   - **WiFi**—Use only the specified wireless network (WLAN).
   - **Cell**—Use only the cellular network.
   - **Auto**—If the mobile device is within range of the enterprise Wi-Fi network, calls are made and received using that network when possible. If the mobile device is not within range of the enterprise network, the cellular network is automatically used.
3. Select **OK**.

3.11 Accessing Voice Mail

There are two types of voice mail that you can access from your mobile device:

- Cellular voice mail—Voice mail for the phone number of your mobile device
- Enterprise voice mail—Voice mail for your enterprise (corporate) phone number

3.11.1 Accessing Cellular Voice Mail

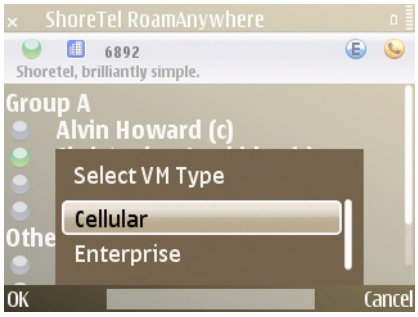
RoamAnywhere Client automatically tries to retrieve the cellular voice mail box number on your SIM card. If the number cannot be retrieved, you need to manually configure the phone number used to access the cellular voice mail by using the Advanced Preferences tab. For information about how to manually configure the cellular voice mail phone number, see "Changing Advanced Preferences" on page 8-5.

NOTE The call to access cellular voice mail is made directly over the cellular network and is not routed through the enterprise.

To access cellular voice mail:

1 Select **Options > Voice Mail**.

2 Select **Cellular**.



You are now connected to your cellular voice mailbox. Check your voice mail as you normally would.

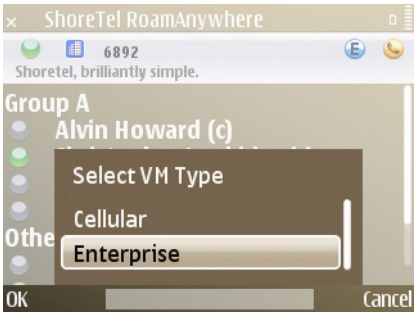
3.11.2 Accessing Enterprise Voice Mail

A voice mail indicator notifies you that there is voice mail waiting.

To access corporate voice mail:

1 Select **Options > Voice Mail**.

2 Select **Enterprise**.



You are now connected to your corporate voice mail system. Access your mailbox as you normally would.

3.12 Making Emergency Calls

To make a call to an emergency number, dial the emergency number as you normally would. Calls placed to emergency numbers are not routed through the enterprise.

If you are on a call using the enterprise Wi-Fi network and make a call to an emergency number, the non-emergency call is dropped.

You can also make emergency calls if there is no SIM card in the mobile device if your cellular service provider supports this feature.

4 Presence and Instant Message

After installing RoamAnywhere Client, the primary client interface on your mobile device displays your Presence in the system, including your status and location, as well as the presence of others (aka "buddies") configured in the enterprise and registered on the Server. Presence is automatically adjusted and updated to the status set on the Server, for example, if you are currently available, in a meeting, or traveling.

A Presence license must be configured on the RoamAnywhere Mobility Router before using the Presence/IM features on the client, including sending and receiving calls from a Buddy, accessing Directory Query (searching), and all Instant Messaging actions. Refer to the *ShoreTel Mobility Router Administrator's Guide* for more information.

- This chapter contains the following sections:

- "Presence Icons" on page 4-3
- "Enabling Presence" on page 4-6
- "Setting Presence" on page 4-7
- "Setting Location" on page 4-8
- "Editing the Presence Message" on page 4-9
- "Adding and Deleting Buddies" on page 4-10
- "Setting a Buddy's Access Level" on page 4-13
- "Groups of Buddies" on page 4-14
- "Using Instant Message" on page 4-15
- "Viewing Buddy Details" on page 4-24
- "Sorting the Buddy List" on page 4-25
- "Logging In/Out" on page 4-26
- "Sending Email to a Buddy" on page 4-27
- "Transferring a Call to a Buddy" on page 4-28
- "Conferencing with a Buddy" on page 4-29

- "Calling a Buddy" on page 4-30
- "Calling Voice Mail" on page 4-32
- "Searching for a Buddy" on page 4-33

4.1 Presence Icons

The following icons show the user's presence status:

Table 4-2 Status Icons

Status Icon	Description
	Available
	Away
	Busy
	Do Not Disturb (DND)
	Inactive
	In a Meeting
	In a Conference
	Offline
	Be Right Back (BRB)
	Out of the Office
	In a Call

The following table describes RoamAnywhere Client icons and their representative descriptions on the XMPP Server:

Table 4-3 RoamAnywhere Client Icons and XMPP Status

RoamAnywhere Client Icon	RoamAnywhere Client Description	XMPP Status
	Available	Available or Free to Chat
	Away	Extended Away
	Inactive	Away - I'm Away
	In a Meeting	Away - In a Meeting
	Be Right Back	Away - Be Right Back
	Out of Office	Away - Out of Office
	In a Call	Away - On Phone
	Busy	DND
	DND	DND
	Offline	Unavailable

The following table describes location icons:

Table 4-4 Location Icons

Status Icon	Description
	Home
	On the Road
	Office
	Custom Location

4.1.1 Access Levels

The following Access Levels are supported:

- **Personal** - Contacts see your published contact information, including home and mobile phone numbers, as well as schedule and availability details.
- **Team** - Contacts see your published work and mobile phone numbers, as well as schedule and availability details. Contacts at this level may interrupt you when your status is Do Not Disturb.
- **Company** - Contacts see your work contact information. If you have Outlook 2003 or later and Office Communicator 2007 installed, Office Communicator can gather calendar and other Outlook related information and provide the information to Communicator Web Access for display in the contact card.
- **Public** - Contacts see your name, email address, title, company, and your status.
- **Blocked** - Contacts cannot send you instant messages, and they can only see your name and e-mail address. Your status appears as Offline.

  IMPORTANT Depending upon your mobile device and your Server, and how each has been configured, the following options might be accessed differently or displayed differently from the examples in the following sections.

4.2 Enabling Presence

Enable Presence to use Presence features such as adding or deleting Buddies, creating Groups of Buddies, and Sorting Buddies, as well as to allow others in the network to view your location and your availability.

To enable Presence:

1 From the Home screen, select **Options > Preferences > Presence > Enable**.

NOTE When enabling Presence for the first time, a popup may display asking to confirm your user name ("Enter Presence ID") and password ("Enter Presence Password"). This could occur if your Server user name differs from your ShoreTel Mobility Router user name. To resolve this authentication, enter your user name and password.

4.3 Setting Presence

Setting Presence status allows Buddies to view your availability.

To set your status:

1. Scroll to the top of the Buddy list so that none of your Buddies are highlighted. This enables you to perform actions for your ID.
2. Select the center button to see a pop-up menu. Select **Set Presence**.

3. Choose a status from the list.

NOTE Depending upon the chosen status, the indicator next to your Buddy name changes.

4.4 Setting Location

Setting your location allows other Buddies to view your location status.

To set your location:

1 Scroll to the top of the Buddy list so that none of your Buddies are highlighted. This enables you to perform actions for your ID.

2 Select the center button to see a pop-up menu. Select **Set Location**.

3 Choose a location from the list.

NOTE Depending upon the chosen location, the indicator next to your Buddy name changes.

A Select **Custom Location** to enter a customized location. In the **Enter location name** field, use the keypad to type in the details of the location.

B Select **OK** to continue and display the new location message, or select **Cancel** to return to the Presence window without saving changes.

4.5 Editing the Presence Message

The Presence message is an outgoing note from you, to be viewed by all Buddies.

To edit your Presence message:

1. Scroll to the top of the Buddy list so that none of your Buddies are highlighted. This enables you to perform actions for your ID.
2. Select the center button to see a pop-up menu. Select **Edit Message**.

3. In the **Display Message** field, use the keypad to type in the message.

4. Select **OK** to continue and display the new outgoing message, or **Cancel** to return to the Presence window without saving changes.

4.6 Adding and Deleting Buddies

Use the Buddy list function to add and delete Buddies.

4.6.1 Adding Buddies

To add a Buddy:

1 From **RoamAnywhere Client**, select **Options** > **Buddy List**.

2 Select **Add Buddy**.

3 In the **Enter Buddy Name** field, type in the Uniform Resource Identifier (URI) name as entered on the enterprise server, for example john@eng.shortel.com or 1175@qa.shoretel.com, or enter the extension number, for example 1175. Check with your System Administrator if you are unsure of the credentials.

4 Select **OK** to continue and display the new Buddy, or **Cancel** to return to the Presence window without saving changes.

4.6.2 Deleting Buddies

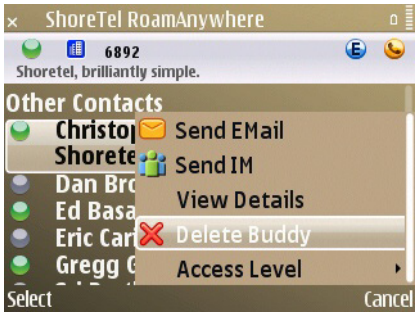
One or more Buddies can be deleted from the Buddy list.

You can delete one Buddy using two different methods. To delete one Buddy:

1 From RoamAnywhere Client:

- Select **Options** > **Buddy List** > **Delete Buddy**, or

- Select a Buddy, press the center button on the keypad to view the Buddy options, then select **Delete Buddy**.



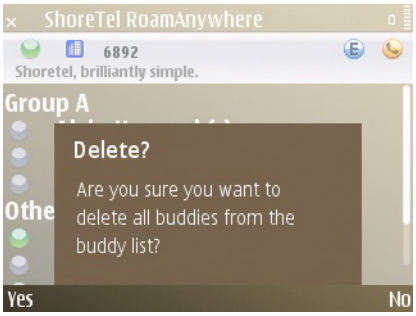
2 Select **Yes** or **No** when prompted **Are You Sure?**

To delete all Buddies:

1 From **RoamAnywhere Client**, select **Options** > **Buddy List**.

2 Select **Delete All**.

3 Select **Yes** or **No** when prompted **Delete?** If **Yes**, all Buddies in the list are removed.



4.7 Setting a Buddy's Access Level

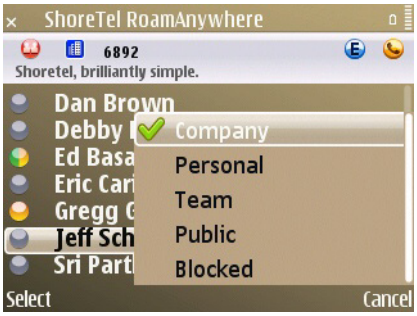
Buddies can be given different access levels in your network. Refer to "Access Levels" on page 4-5 for a list of access levels.

IMPORTANT Depending upon your mobile device and your Server, and how each has been configured, the following options might be accessed differently or displayed differently from the examples in the following sections.

To change a Buddy's access level:

1. From **RoamAnywhere Client**, select a Buddy.
2. Press the center button on the keypad to view Buddy options.
3. Select **Access Level**.

4. Select the appropriate access level.



NOTE The valid selections in order of priority are Personal, Team, Company, Public, and Blocked where Personal has the highest priority (the user's location can be seen by all buddies who are set to Personal), Team is the second highest priority (the user's location can be seen by all buddies set to Team or Personal), etc. Public has the lowest access level. A Blocked user can not follow the Buddy's status, nor is this information visible.

4.8 Groups of Buddies

Groups can be created on the Server and Buddies (Users) can be assigned to one or more Groups. If a Buddy has been assigned to a Group on the server, both the Group name and associated Buddy display in read-only mode in the Buddy list on the mobile device.

NOTE Groups can not be added, deleted or modified on the mobile device. These functions are performed on the Server.

4.9 Using Instant Message

Use the Instant Message (IM) feature to chat with a Buddy when Presence and IM are enabled on the mobile device. The Server and mobile device must be configured, and the Presence license must be activated on the Server. Refer to the *ShoreTel Mobility Router Administrator's Guide* for more information on activating a Presence license and enabling Presence for the user.

NOTE During a call, data connectivity to the Presence Server is required for all Presence/IM actions to function. For more information on call handling during IM sessions, refer to "Using Instant Message While on a Call" on page 4-23.

4.9.1 Two-Party Conversations

You can initiate or reply to an IM, as well as manage older conversations by opening and closing previous conversations.

4.9.1.1 Initiating a Two-Party Conversation

1. From **RoamAnywhere Client**, select a Buddy.
2. Press the center button to view Buddy options.
3. Select **Send IM**. The IM conversations window displays.

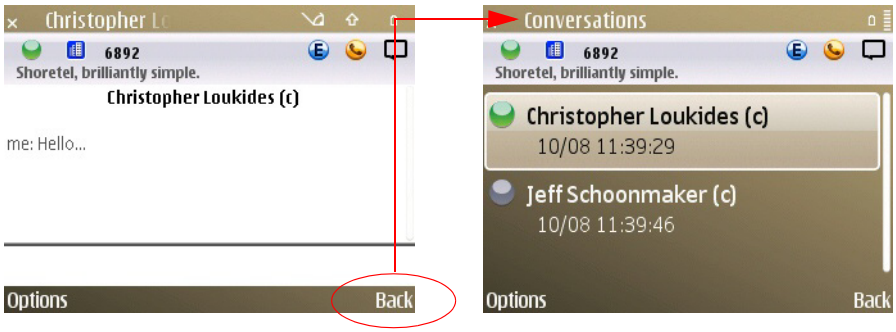
4. The cursor flashes in the text field. Enter text and press the center button or Enter to send the IM.

NOTE Use the left/right/up/down directions on the center button to navigate and edit the IM. Use Shift+Enter to enter a carriage return within the IM.

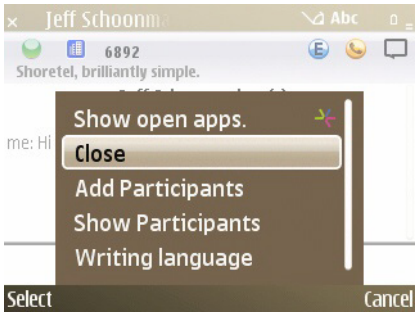
NOTE The messages between the parties display in the upper window. Your IM displays as “me”.

5 The **Conversations** window displays all conversations. You can view the Conversations window using two methods:

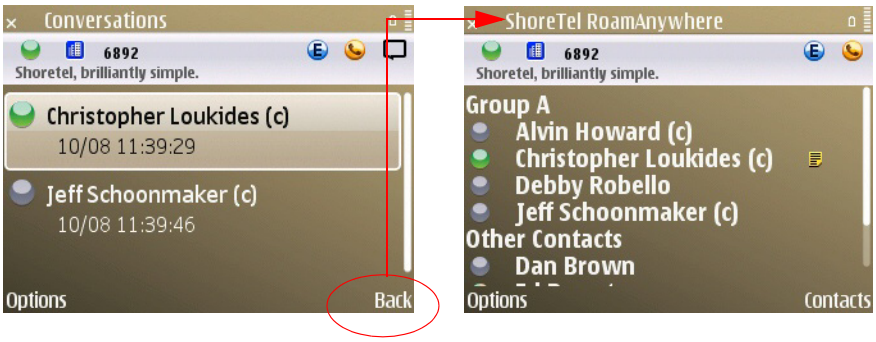
A From the IM, select **Back**, or



B From the IM, select **Options > Close** to close this IM.



6 Select **Back** in the **Conversations** window to exit this window and return to the Buddy list.



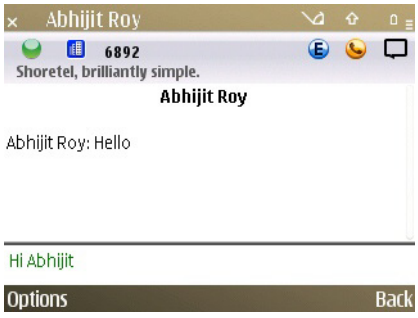
NOTE Refer to "Open, Close and Close All Instant Messages" on page 4-18 for more information about retrieving previous IMs that have not been closed.

4.9.1.2 Replying to a Two-Party Conversation

When an IM pops up in RoamAnywhere Client, the cursor flashes in the IM text field.

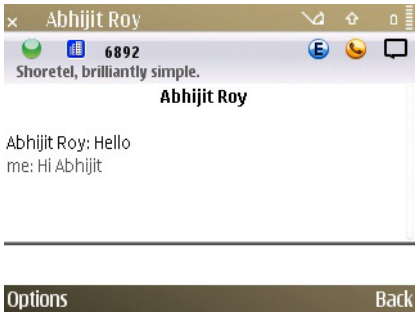
To reply to an IM:

1 Enter text and press the center button or the Enter key.



NOTE Use the left/right/up/down directions on the center button to navigate and edit the IM. Use Shift+Enter to enter a carriage return within the IM.

NOTE The messages between the parties display in the upper window. Your IM displays as "me".



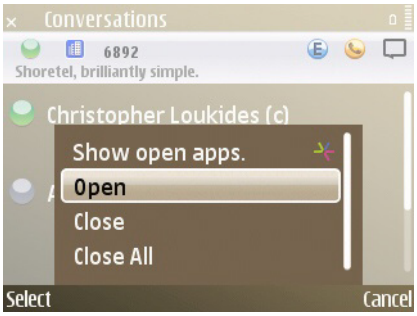
4.9.1.3 Open, Close and Close All Instant Messages

Previous conversations can be opened to continue a session using the **Conversations** window. In addition, all conversations or individual conversations can be closed from the **Conversations** window.

1 From **RoamAnywhere Client**, select **Options > Conversations** to view all previous IMs that have not been closed.

2 Use the up/down function on the center button to scroll to and select an IM.

A Select **Open** to retrieve and continue a session **Close** to close this IM session, or **Close All** to close all IM sessions.

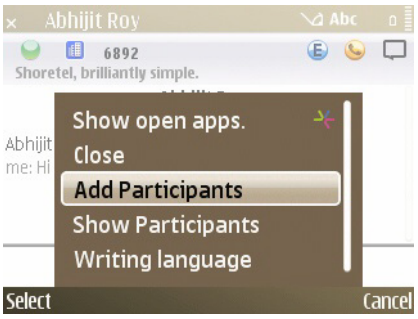


4.9.2 Multi-Party Conversations

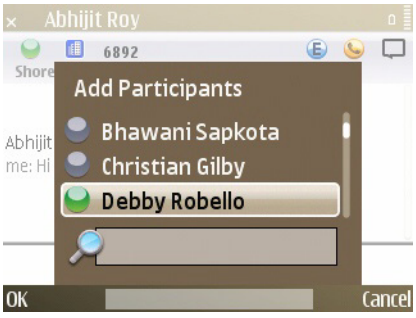
You can add more than one participant to an IM to create a multi-party conversation. You can also remove one or more participants from an existing multi-party conversation.

4.9.2.1 Adding Participants

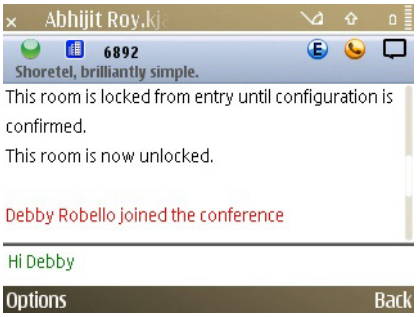
1 After an IM has been initiated with one participant, select **Options > Add Participants**.



2 Scroll to a participant then press the center button or select **OK** to add. This participant is now added to the address line of the IM.



3 Any further entries from the existing participants are now visible to the new participant, and the new participant's entries are now visible to the existing participants.



NOTE To add multiple participants, use the Shift key + center button to select a participant, then repeat this action for each participant. A checkmark displays next to the name indicating this participant has been selected. Select **OK** to add all checked participants to the current conversation, or select **Cancel** to return to the conversation without adding any participants.

4.9.2.2 Replying to a Multi-Party Conversation

When an IM pops up in RoamAnywhere Client, the cursor flashes in the IM text field. Enter text as described in "Replying to a Two-Party Conversation" on page 4-17. Your entries are seen by all participants in the conversation.

4.9.2.3 Removing Participants

The initiator of a conversation is the Moderator. The Moderator can remove one or more participants from the conversation. Users without Moderator privileges do not have permission to remove participants.

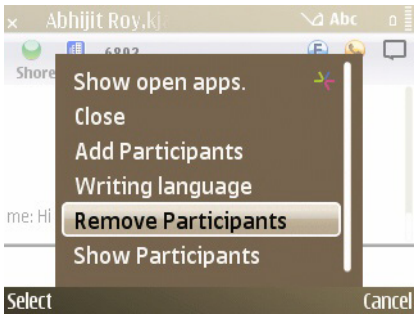
Using the desktop instant message client, a Moderator can grant Moderator privileges other users.

IMPORTANT Moderators can not be removed.

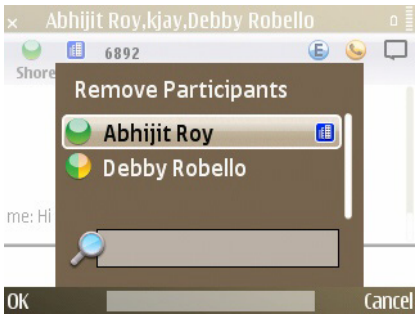
NOTE Refer to your desktop instant message client documentation for more information about granting Moderator permissions.

If you are a Moderator, to remove a participant:

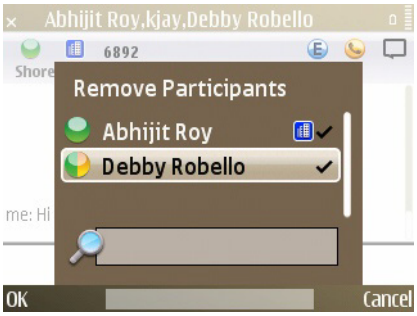
1 In an IM with at least two participants, select **Options > Remove Participants**.



2 Scroll to a participant then press the center button or select **OK** to remove. This participant is now deleted from the address line of the IM and is no longer part of the conversation.



NOTE To remove multiple participants, select the Shift key + center button to select a participant. A checkmark is placed next to the name indicating this participant has been selected. Select **OK** to remove all checked participants from the current conversation, or select **Cancel** to return to the conversation without removing any participants.

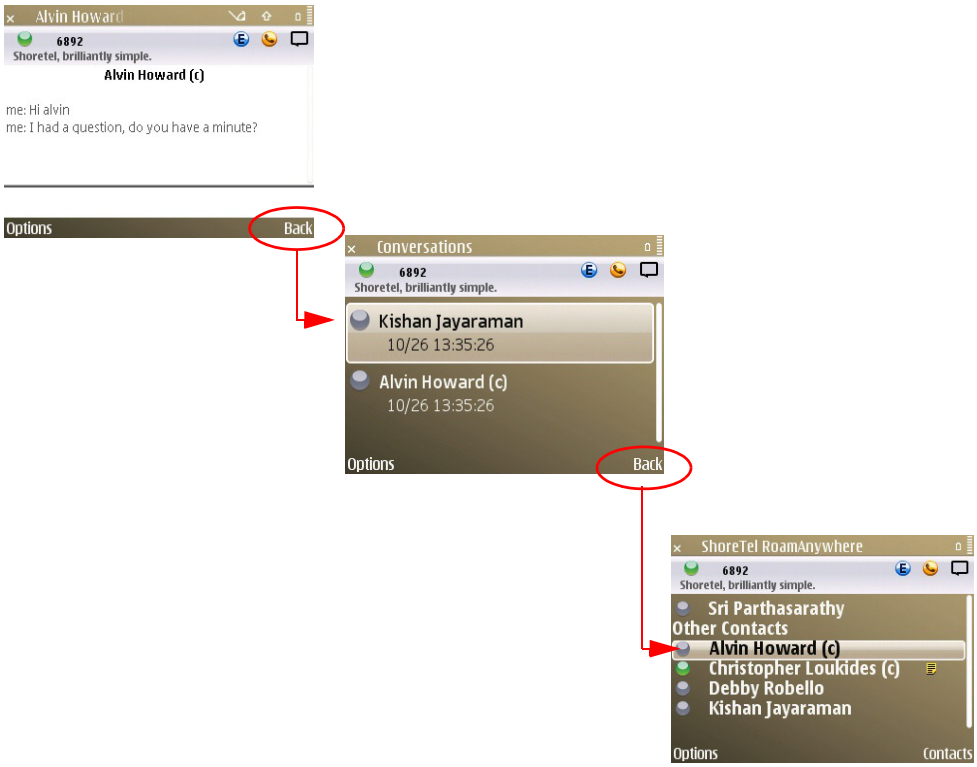


4.9.3 Making and Receiving Calls while Using Instant Message

You can make or receive a call during an Instant Message session.

4.9.3.1 Making a Call During an IM Session

1 From the IM session, select **Back** to view the **Conversations** window, then select **Back** again to view the Buddy list.



2 Select the Buddy then select the center button to view **Call Work**, **Call Home** or **Call Mobile**. The call window displays. You can navigate between the call window, the Buddy list, and the IM using the left/right navigation keys.

NOTE If the Buddy's cellular device, enterprise device or home number is configured on the Server, the corresponding number is called. If a number is not configured, the option is not available.

NOTE To call someone not on the Buddy list, select **Back** to view the Conversations window, then select **Back** again to return to the main RoamAnywhere Client screen. Select **Options >Directory Query** or enter digits to place a call. Refer to "Searching the Corporate Directory Using RoamAnywhere Client" on page 7-1 for more details.

4.9.3.2 Receiving a Call During an IM Session

During an IM session, an incoming call displays in the main window. Answer or reject the call as appropriate using the Answer or Decline options.

4.9.4 Using Instant Message While on a Call

You can initiate or respond to IMs during a call using the same actions as a standard IM session. The caller is not put on hold.

To send an IM while on a call:

1. Press the left function on the center button to view the Buddy list.
2. Refer to "Initiating a Two-Party Conversation" on page 4-15 and "Adding Participants" on page 4-19 for specific information on starting a single and multi-party IM sessions.

To respond to an IM while on a call:

1. Refer to "Replying to a Two-Party Conversation" on page 4-17 and "Replying to a Multi-Party Conversation" on page 4-20 for specific actions for responding to an IM popup.

4.10 Viewing Buddy Details

Buddy information including status, location and contact information is viewed in the Details area for each Buddy.

To view Buddy information:

1 From **RoamAnywhere Client**, select a Buddy.

2 Press the center button on the keypad to view Buddy options.

3 Select **View Details**.

4 Information relevant to this Buddy displays, including status, location, access level, and contact information. This information is read-only by everyone other than this Buddy.

IMPORTANT Depending upon your mobile device and your Server, and how each has been configured, the following options might be accessed differently or displayed differently from the examples in the following sections.

5 Select **Back** to return to the main Presence window.

4.11 Sorting the Buddy List

Use the Sort feature to change the order in which Buddies are displayed. To sort Buddies:

1 From the **RoamAnywhere Client**, select **Options** > **Sort Buddy List**.

2 Choose the preferred method of viewing the Buddy list. The options are **Sort By Name**, **Sort By Availability** or **Sort By Location**. After making a selection, the screen returns to the Buddy list and has been updated accordingly.

4.12 Logging In/Out

To log out of the Server:

1 From the **RoamAnywhere Client**, select **Options** > **Logout**.

To login to the Server:

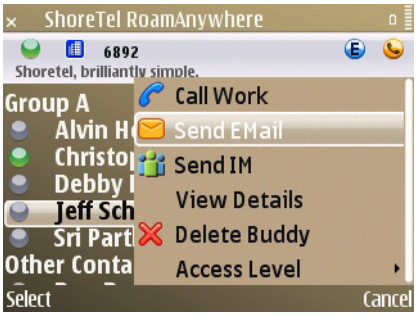
1 From the **RoamAnywhere Client**, select **Options** > **Login**.

4.13 Sending Email to a Buddy

The following procedure assumes your device's native email settings have been previously configured.

To send a buddy email:

1. From **RoamAnywhere Client**, select a Buddy.
2. Press the center button to view Buddy options.
3. Select **Send Email**.



4. The native email applications associated with the Server display. Select an application by which to send the message and follow the native application instructions for sending the email.
5. After the message is sent, the main Presence window displays. A brief pop-up message advises that your message has been sent.

4.14 Transferring a Call to a Buddy

While you are on an active call, use the Transfer To function to transfer the call to a Buddy. If you transfer a call that is on the cellular network, the transfer takes longer than it does for a call on the enterprise Wi-Fi network. A cellular transfer dials out a second call using the cellular interface.

To Transfer a call to a Buddy:

1. While on an active call, use the left direction key on the center button to view the Buddy list. Select a Buddy.
2. Press the center button to view Buddy options.
3. Select **Transfer To**.

4. The call is transferred to the selected Buddy.

4.15 Conferencing with a Buddy

While you are on an active call, use the Conference function to conference with a Buddy.

To make a conference call with a Buddy:

1. While on an active call, use the left direction key on the center button to view the Buddy list. Select a Buddy.
2. Press the center button to view Buddy options.
3. Select **Conference**.

4. The Buddy is conferenced in to the existing call.

4.16 Calling a Buddy

Use the **Call** feature to call a Buddy's cellular or enterprise device when the device is configured on the Server. Refer to the *ShoreTel Mobility Router Administrator's Guide* for more information. To call a Buddy's device:

1 From **RoamAnywhere Client**, select a Buddy.

2 Press the center button to view Buddy options.

3 Select **Call Work**, **Call Home** or **Call Mobile**.

NOTE If the Buddy's cellular device, enterprise device or home number is configured on the Server, the corresponding number is called.

NOTE If a number is not configured, the option is not available.

4.16.1 Calling a Buddy While On Another Call

You can call a Buddy when a call is in progress. The first call is placed on hold when the second party is called. It is not necessary to manually place the first call on hold. To call a Buddy when already on a call:

1 While on the primary call, select the left key on the center button to view the Buddy list.

2 Select a Buddy and press the center button to view Buddy options.

3 Select **Call Work**, **Call Home** or **Call Mobile**.

NOTE If the Buddy's cellular device, enterprise device or home number is configured on the Server, the corresponding number is called.

4.17 Calling Voice Mail

Use the **Call Voice Mail** feature to access your cellular or enterprise voice mail from the Presence screen. This function is active only when there is voice mail. The voice mail indicator icon shows if a voice mail message is waiting. Refer to "RoamAnywhere Client Icons" on page 2-5 for a description of this icon.

To call voice mail:

1. Scroll to the top of the Buddy list so that none of your Buddies are highlighted. This enables you to perform actions for your ID.
2. Select the center button to see a pop-up menu. Select **Call Voice Mail**. In the pop-up window, select **Cellular** or **Enterprise**.

NOTE The Enterprise number dialed is based on the information configured on the Server

4.18 Searching for a Buddy

You can use the Directory Query feature from the Buddy list. This option allows you to search for a user based on name or number.

To make a search using the Directory Query feature from the Buddy list:

1 From the Client, scroll down into the active Buddy list and enter the first few characters of the user for which you are searching. The letters entered are displayed as numbers on the screen. For example, entering TRA shows as 87772 (8=T, 777=R, 2=A). Note that "777" is equal to 3 key-presses for the letter R.

2 Select the Call button to call the displayed number.

5 Managing Secure Remote Access

Secure remote access allows you to use the following features:

- Secure Remote Voice (if your RoamAnywhere™ solution is licensed for it) allows you to securely place and receive calls using any Wi-Fi network. Secure Remote Voice uses Secure Sockets Layer (SSL) to ensure that your calls are secure. You can Secure Remote Voice from home or any other Wi-Fi hotspot and have access to PBX and desk-phone features, just as you do when you are in the enterprise.
- Secure enterprise services such as directory query and managing home locations, are accessed using a Wi-Fi network that is not in the enterprise network or a cellular packet-data network.

Depending on how your system administrator configured your account, you might have access to Secure Remote Voice or secure enterprise services or both. Contact your system administrator if you are not sure whether you have secure remote access enabled on your account.

This chapter contains the following sections:

- "Before You Begin" on page 5-2
- "Verifying that Secure Remote Voice Is Enabled" on page 5-3
- "Verifying that Secure Enterprise Services Are Enabled" on page 5-3

5.1 Before You Begin

Perform the following tasks before using Secure Remote Voice and Secure Enterprise Services:

- Create a Wi-Fi access point on your mobile device for a non-enterprise Wi-Fi network. Refer to "Setting Up a Wi-Fi Access Point on Your Mobile Device" on page 1-4 for details.
- Create a packet-data access point on your mobile device for the cellular packet-data network. Refer to "Changing Network Preferences" on page 8-3 for details on Preferred Data Connections.
- Configure and connect to a non-enterprise Wi-Fi network using your mobile device.
- Add the non-enterprise Wi-Fi network as a preferred connection in RoamAnywhere Client.
- Verify that Secure Remote Voice and Secure Enterprise Services are accessible with your RoamAnywhere user account. Refer to "Verifying that Secure Remote Voice Is Enabled" on page 5-3 and "Verifying that Secure Enterprise Services Are Enabled" on page 5-3.

If you are using a Wi-Fi from a hotspot or similar network, you might need to access a public Web page after creating a Wi-Fi access point on your mobile device so that you can enable access to the Internet. After you have established Internet connectivity, you can then add the access point as a preferred connection in RoamAnywhere Client.

NOTE Before you prepare to use Secure Remote Voice or access secure enterprise services, verify that your RoamAnywhere user account is configured to use these features. If you are not sure whether you are authorized to use these features, contact your system administrator.

5.2 Verifying that Secure Remote Voice Is Enabled

After adding the remote Wi-Fi network as a preferred connection in RoamAnywhere Client, the mobile device automatically connects to the Wi-Fi network and gets registered with your organization's IP-PBX system.

If the Secure Remote Voice icon is present, the mobile device is registered, which indicates that VoIP is available. The icon's presence does not guarantee that all calls are made or received using the Wi-Fi network. By default, the RoamAnywhere solution determines whether to route a call using VoIP based on the signal strength of the Wi-Fi network, even if VoIP is available.

Secure Remote Voice

5.3 Verifying that Secure Enterprise Services Are Enabled

After adding the remote Wi-Fi access point as a preferred connection in RoamAnywhere Client, the mobile device automatically connects to the Wi-Fi network and attempts to register for Secure Enterprise Services. In the main RoamAnywhere Client screen, verify that the Secure Enterprise Services icon is present. The following icons display:

Secure Remote Voice

Secure Enterprise Services

When the Secure Enterprise Services and Secure Remote Voice icons are present, you can securely access enterprise services such as directory query, home locations, and the enterprise voice mail indicator.

Using Location Management 6

Using RoamAnywhere Client, you can specify a Wi-Fi network outside of the enterprise as a home location. Creating a home location allows you to use that location as criteria when defining how outgoing cellular calls are routed and defining calling rules.

This chapter contains the following sections:

- "Verifying Secure Enterprise Services Availability" on page 6-1
- "Adding Home Locations" on page 6-1
- "Deleting Home Locations" on page 6-3

6.1 Verifying Secure Enterprise Services Availability

You can create a home location for a remote Wi-Fi network only if your account is configured to access secure enterprise services. If you are not sure whether your account has been configured to access secure enterprise services, ask your system administrator.

6.2 Adding Home Locations

When you are at home or another remote location that has a Wi-Fi network, you can use RoamAnywhere Client to create a home location, which defines information about the Wi-Fi access point, such as the service set identifier (SSID) and basic service set identifier (BSSID). When you create a home location using RoamAnywhere Client, the location information is automatically sent to the Mobility Router, which allows it to route outgoing cellular calls based on your location. If you define calling rules, you can use location as criteria to define how calls are routed.

If you use RoamAnywhere Client to create a home location, there are two methods you can use:

- Automatic—Use this method if you do not know the SSID of the access point, need to specify a particular SSID, or do not need to specify multiple BSSIDs of the Wi-Fi access point.

  When you use the automatic method, you cannot specify SSID for the home location. The SSID of the access point is automatically used. If there are multiple SSIDs at the location, the first SSID that RoamAnywhere Client detects is the one used.

- Manual—Use this method if you want to specify a particular SSID (for example, the location has multiple SSIDs), or know that the Wi-Fi access point has multiple BSSIDs and you want to define specific BSSIDs for the home location.

Each home location must have a unique SSID.

In addition to managing home locations with RoamAnywhere Client, you can also manage home locations with the User Portal, as described in the *RoamAnywhere User Portal Guide*.

To add a home location:

1. In the RoamAnywhere Client main screen, select **Options > Preferences**.
2. In the Network Preferences tab, scroll to Home Locations, and select **Options > Change**.
3. Select **Options > Add Location**.
4. Select one of the following:

   - **Automatic—**Select if you do not know the SSID and BSSID of the access point or do not need to specify these values yourself. The SSID and BSSID are automatically retrieved from the access point, and you cannot edit the values before adding the home location.
   - **Manual—** Select if the access point has multiple SSIDs or BSSIDs.

   The Add Location screen appears.
5. Select the Name field.
6. In the Name box, enter the name of the home location. The name can be up to 64 alphanumeric characters long and can contain spaces, hyphens (-), and underscores (_).
7. Select **OK**.
8. Verify the SSID.
9. Do one of the following:

   - If you do not need to change the SSID, go to Step 12.
   - If you need to change the SSID, select the SSID field, and go to Step 10.

   NOTE If you selected the Automatic method to add a location, you cannot edit the SSID. You can change the SSID value when editing an existing location.

10 In the SSID box, enter the SSID. The name can be up to 64 alphanumeric characters long and can contain spaces, hyphens (-), and underscores (_).

11 Select **OK**.

12 Verify the BSSID.

13 Do one of the following:

- If you do not need to change the BSSID, go to Step 15.
- If you need to change the BSSID, select the BSSIDs field, and go to Step 14.

IMPORTANT If you selected the Automatic method to add a location, you cannot edit the BSSID. You can change the BSSID value when editing an existing location.

14 Select the BSSID(s) that you want defined as part of the home location, and select **OK**.

15 On the Add Location screen, select **Options > Save**. The home location is added to the Home Locations page.

6.3 Deleting Home Locations

If you no longer want to include a home location as part of your user profile, you can delete the home location. If you have only one home location defined and delete it, any calling rules or call routing options that use a home location as criteria will no longer be activated when you are in proximity of the home location. Use the User Portal to verify whether location is being used in your calling rules or calling options. For more information, see the *RoamAnywhere User Portal Guide*.

To delete a home location:

1 In the RoamAnywhere Client main screen, select **Options > Preferences**.

2 In the Network Preferences tab, scroll to Home Locations, and select **Options > Change**.

3 Navigate to the home location that you want to delete, and select **Options > Delete Location**.

4 Make sure that the home location you want to delete is selected.

5 Select **Options > Save**. The home location is deleted.

7 Searching the Corporate Directory Using RoamAnywhere Client

If your company uses an LDAP-based corporate directory server and your system administrator has configured the RoamAnywhere Mobility Router to query that directory server, RoamAnywhere Client allows you to search the corporate directory from your mobile device. If your mobile device is connected to the enterprise Wi-Fi network, you can search the corporate directory.

If you are outside the enterprise Wi-Fi network, you can search the corporate directory only if your system administrator has configured your RoamAnywhere user account to access enterprise services using a remote Wi-Fi network or cellular packet-data network (for example, GPRS). Searching the corporate directory using a remote Wi-Fi or cellular packet-data network is a secure transaction.

This chapter contains the following sections:

- "Using the Corporate Directory outside of the Enterprise" on page 7-2
- "Searching the Corporate Directory" on page 7-2
  - "Viewing Directory Query User Information" on page 7-3
  - "Placing a Call Using Directory Query" on page 7-3
  - "Adding a Directory Query Match to Contacts" on page 7-4

7.1 Using the Corporate Directory outside of the Enterprise

If your system administrator has configured your RoamAnywhere account to use secure enterprise services, you can use the following networks to search the corporate directory when outside of the office:

- Cellular packet-data network

  Use the data network of your cellular service provider to access the corporate directory. The network depends on your service provider and the networks your mobile device supports. If you search the corporate directory using a cellular data network, you incur data charges, based on your service plan. For information about your mobile device and cellular service plan, contact your cellular service provider or your system administrator.

- Wi-Fi network outside of the enterprise

  If you can establish a connection to a Wi-Fi network with your mobile device, you can search the corporate directory.

If you are not sure whether you have access to the corporate directory outside of the office, contact your system administrator.

For information about how to set up your mobile device to access secure enterprise services, see "Managing Secure Remote Access" on page 5-1.

7.2 Searching the Corporate Directory

If your mobile device is connected to the enterprise Wi-Fi network, you can search the corporate directory just like you can using your desk phone. If you have access to secure enterprise services, you can also search the corporate directory using a remote Wi-Fi or cellular packet-data network.

To search the corporate directory:

1 From the RoamAnywhere Client main screen, select **Options > Directory Query**.

2 Enter a string of letters or numbers that you want to search for in the corporate directory, and select **OK**.

NOTE If the mobile device is not registered to access secure enterprise services, the Directory Query option does not appear in the Options menu. For information about setting up secure remote access, see "Managing Secure Remote Access" on page 5-1.

If any names in the directory match the string that you typed, those names appear. For example, entering "joe" displays all users with first name or last name that start with this string. If no names in the directory match the string that you typed, a message displays that no matches were found appears.

7.2.1 Viewing Directory Query User Information

If your directory search provides a match, any associated information that a user has chosen to present in the corporate directory will display (for example, home number or personal cell number).

To view details about a Directory Query match:

1. From the list of Directory Query matches, use the scroll key to navigate to the person for which you want more information.
2. **Options > View Details**.

   The following includes but is not limited to a list of corporate directory information:

   - Name
   - Work
   - Cell
   - Home

   The contact information that is listed depends on the information that is in the corporate directory. For example, if there is no home phone number listed in the corporate directory, no home phone number is shown in the list of additional contact information.

7.2.2 Placing a Call Using Directory Query

You can call a person who is in the directory search match list using the contact information from the list instead of manually dialing the person's phone number.

To place a call using a directory search match:

1. From the list of directory search matches, use the scroll key to navigate to the person that you want to call.
2. To place a call, select **Options > Call** or press **Call**.
3. Scroll to the phone number you want to call, and select **Call**. The call is placed.

7.2.3 Adding a Directory Query Match to Contacts

You can add the contact information from any directory query match to your mobile device's local Contacts.

To add a Directory Query match to your Contacts:

1. From the list of directory search matches, use the scroll key to navigate to the person that you want to add to your Contacts.
2. Select **Options > Add Contact**.
3. Do one of the following:
   - To add the person to the Contacts, select **Yes**. A confirmation message appears after the contact is added.
   - If you do not want to add the person to the Contacts, select **No**.

8 Changing RoamAnywhere Client Preferences

Use the Settings feature to view or modify General, Network, and Advanced RoamAnywhere Client preferences, and Call Settings such as Do Not Disturb and Forwarding of calls, enabling and uploading logs.

> **NOTE** The Preferences option is unavailable for Restricted mode users. See your system administrator for information on Restricted and Full client privilege modes.

This chapter contains the following sections:

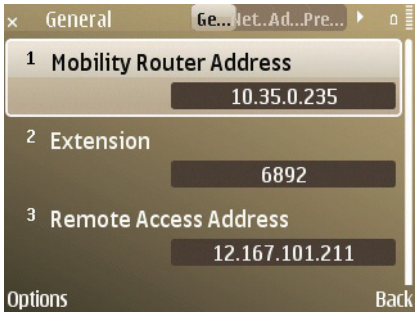
- "Changing General Preferences" on page 8-2
- "Changing Network Preferences" on page 8-3
- "Changing Advanced Preferences" on page 8-5
- "Changing Call Settings" on page 8-8
- "Changing Presence Preferences" on page 8-10
- "Uploading Logs to the ShoreTel Mobility Router" on page 8-12

8.1 Changing General Preferences

You can view your Mobility Router Address, Extension and Remote Access Address.

To access general preferences:

1. In the RoamAnywhere Client main screen, select **Options > Preferences**. The General tab is active.



2. Verify the information. These fields are read-only.

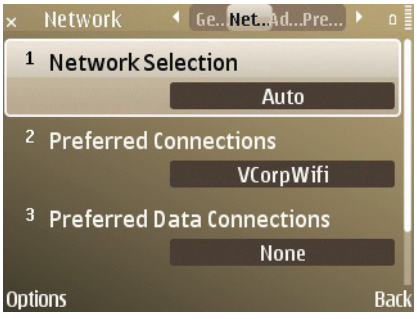
8.2 Changing Network Preferences

You can perform the following tasks when changing RoamAnywhere Client Network preferences:

- Specify the **network** to be used when calls are made or received. If the device is not within range of the enterprise Wi-Fi network, the cellular network is used.
- Specify the **Preferred Connections** or access points (APs) that the mobile device connects to when in range of the network.
  - If you select multiple access points, the APs that you added and have been used most recently are the APs that the mobile device tries to connect to first.
  - If you have Secure Remote Voice and secure enterprise services enabled for your account, you can also choose one or more remote Wi-Fi networks as preferred connections, which are used when you are in range of those networks.
- Specify the packet-data access points that the mobile device uses for connectivity to a cellular packet-data network.
  - If you have Secure Remote Voice and secure enterprise services enabled for your account, you can use a packet-data network connection to securely make calls and use enterprise services.
  - If Secure Remote Voice is enabled for the RoamAnywhere solution for your enterprise, you can also specify a home location as a preferred connection, allowing you to make VoIP calls using the Wi-Fi network of the home location.
- Specify home locations. This is a Wi-Fi network outside of the enterprise. Creating a home location allows you to use location as criteria when defining how cellular calls are routed and defining calling rules.

To access **Network** preferences:

1. In the RoamAnywhere Client main screen, select **Options > Preferences**. Use the right scroll key to navigate to the **Network** tab.



2. To change the network to which the mobile device connects to, use the scroll key to navigate to Network Selection.
3. Select **Options > Change**.

4 Select one of the following:

- **WiFi**—Use only the enterprise Wi-Fi network.
- **Cell**—Use only the cellular network.
- **Auto**—If the mobile device is within range of the enterprise Wi-Fi network, calls are made and received using that network when possible. If the mobile device is not within range of the enterprise network, the cellular network is automatically used.

  This option is the default value.

5 Select **OK**.

To change the preferred access points for RoamAnywhere Client, use the scroll key to navigate to Preferred Connections.

1 Select **Options**.

2 Do one of the following:

- To change the preferred access points, select **Change**. A list of access points appears.

  A Navigate to the access point that you want to change.

  B Press the scroll key to select/deselect the access point. If the check box is selected, pressing the scroll key clears the check box. If the check box is not selected, pressing the scroll key selects the check box.

  C Repeat steps A and B for each access point you want to change.

  D Select **OK**.

- To create a new access point, select **New Access Point**.

  For more information about adding a new access point, select **Options > Help** and see the documentation for your mobile device.

To specify preferred data connections, use the scroll key to navigate to Preferred Data Connections.

1 Select **Options > Change**.

2 From the list of packet-data access points, select or clear the access points that you want to use as preferred data connections.

3 Select **OK**.

4 To set a home location, use the scroll key to navigate to Home Locations.

For information about creating a home location, see "Adding Home Locations" on page 6-1.

8.3 Changing Advanced Preferences

Perform the following tasks when changing RoamAnywhere Client Advanced preferences:

- Specify the phone number or extension used to access **Enterprise Voice Mail**.
- Specify the phone number used to access cellular voice mail.
- Specify the power-save mode that the mobile device uses:
  - **Always On**—Always search for one of the defined preferred access points and maintain a connection if within range.
  - **Enterprise Only**—If the mobile device is in range of the enterprise, a Wi-Fi connection is maintained. If the mobile device is not in range of the enterprise, no attempts are made to connect to a preferred access point.
  - **Calls Only**—Only make a connection to a preferred access point when calls are placed or received.
- Specify whether RoamAnywhere Client automatically starts when the mobile device is powered on.

  When you first started RoamAnywhere Client, you were asked whether you wanted to enable RoamAnywhere Client to automatically start when you power on the mobile device. You can change this option as part of RoamAnywhere Client's Advanced preferences.

  We recommend that you enable RoamAnywhere Client to automatically start when the mobile device is powered on. Enabling this option allows you to continue receiving enterprise calls after a mobile device reboot.
- Specify the maximum number of entries that are saved in the Log.

To access **Advanced** settings:

1. In the RoamAnywhere Client main screen, select **Options > Preferences**. Use the right scroll key to navigate to the **Advanced** tab.

2. Navigate to Enterprise Voice Mail, and select **Options > Change**.
3. Enter the phone number or extension used to access enterprise voice mail.
4. Select **OK**.

5 Navigate to Cellular Voice Mail Number, and select **Options > Change**.

6 Enter the phone number used to access cellular voice mail.

The cellular voice mail number is the phone number that RoamAnywhere Client calls to access cellular voice mail for the mobile device. The phone number for the mobile device is usually used to access voice mail.

7 Navigate to AutoStart, and select **Options > Change**.

When you first started RoamAnywhere Client, you were asked whether you wanted RoamAnywhere Client to automatically start when you power on the mobile device. Your response set the AutoStart value until you change it here.

8 Select **On** or **Off**.

9 Select **OK**.

10 Navigate to Power Save Mode, and select **Options > Change**.

11 Select one of the following:

- **Always On—**The mobile device always searches for one of the specified preferred access points and maintains a connection if within the range of the enterprise Wi-Fi network. Selecting this option might reduce the device's battery life.
- **Enterprise Only—**If the mobile device is in range of the enterprise, a Wi-Fi connection is maintained. If the mobile device is not in range of the enterprise, no attempts are made to connect to a preferred access point.
- **Calls Only—**If the mobile device is within range of the preferred access point, a connection to the access point is made only when calls are placed or received.

12 Navigate to Maximum Call Log Entries, and select **Options > Change**.

Enter the maximum number of entries to be saved in the Log. You can enter a value from 100 through 999. The default value is 100.

13 Select **OK**.

14 Navigate to Tunnel Protocol, and select **Options > Change**.

15 Select one of the following:

- **Auto—**RoamAnywhere Client automatically chooses the protocol used, based on how the Mobility Router is configured by your system administrator.
- **UDP—**Specifies User Data Protocol as the protocol used for the secure tunnel.
- **TCP—**Specifies Transmission Control Protocol as the protocol used for the secure tunnel.

16 Navigate to In-Call Options, and select **Options > Change**.

The In-Call Options field allows you to specify the function of the right selection key on the mobile device while you are on a call.

17 Select one of the following options:

- **Mute—**Specifies the right selection key as Mute.
- **Loudspeaker—**Specifies the right selection key as Loudspeaker.
- **Transfer To Desk—**Specifies the right selection key as Transfer To Desk.
- **Transfer—**Specifies the right selection key as Transfer.
- **Conference—**Specifies the right selection key as Conference.

18 Select **OK**.

19 Do one of the following:

- Select **Back** to return to the RoamAnywhere Client main screen.
- Use the scroll key to navigate to the General tab. For information about changing network preferences, see "Changing General Preferences" on page 8-2.
- Use the scroll key to navigate to the Network tab. For information about changing advanced preferences, see "Changing Network Preferences" on page 8-3.

8.4 Changing Call Settings

You can specify how calls to your enterprise phone number get routed to your mobile device. You can specify one of the following options:

- Call Forward—Forward all calls to a specified phone number or voice mail.
- Do Not Disturb (DND)—Have your desk phone ring and mobile device not ring for all incoming calls.
- Transfer to Desk—Define the enterprise phone number that is used when you transfer calls to your desk phone. By default, the extension of your enterprise phone number is used when transferring an active call from your mobile device to your desk phone.
- Reverse Dial —Using this feature can potentially reduce the cost of the call. This number enables the calling party to pay for the call, automatically changing an outbound mobile call into an inbound call. This feature is only available only when a data connection is available (Wi-Fi/packet data). The conference feature is not supported in reverse dial mode.

  NOTE The Reverse Dial option is only available after the RoamAnywhere Mobility Router enables the feature for the individual user.

To access call settings:

1. In the RoamAnywhere Client main screen, select **Options > Call Settings**. The Call Settings screen appears.

2. Navigate to one of the following, and select **Options > Change**:
   - Call Forward—Forwards incoming calls to a specified phone number.

     Select one of the following:

     - **None**—No incoming calls are forwarded, and all calls are sent to the mobile device.
     - **Forward to Voicemail**—All incoming calls are immediately forwarded to voice mail. Incoming calls to your enterprise phone number do not ring on your desk phone or mobile device.
     - **Other**—Specifies that all calls are forwarded to a specific phone number.

       After you select this option, enter the phone number to which calls are forwarded, and select **OK**.

NOTE If you select the Other option and select **Cancel** without entering a phone number, the setting reverts back to the previous setting.

- DND—(Do Not Disturb) When enabled, only your desk phone rings for all incoming calls to your enterprise phone number. Your mobile device does not ring.
- Transfer To Desk—By default, the extension of your enterprise phone number is used when transferring an active call from your mobile device to your desk phone.

  If the PBX for your enterprise uses a phone number other than your extension to transfer active calls to your desk phone, you can specify that number. If you need more information about which number your PBX uses to transfer calls, contact your system administrator.

  To change the phone number used to transfer calls to your desk phone:

  a Scroll to **Transfer To Desk**, and select **Options > Change**.

  b Enter the phone number or extension that is used when transferring active calls to your desk phone.

  c Select **OK**.
- Reverse Dial —By default, Reverse Dial is set to Auto mode. Reverse Dial must be enabled on the RoamAnywhere Mobility Router by an Administrator before enabling the feature on the device. Refer to the RoamAnywhere Mobility Router Administrator Guide for more information. To change the Reverse Dial setting:

  a Select **Options > Call Settings**.

  b Scroll to and select **Reverse Dial**.

  c Select **Auto**, **On** or **Off**.

  d Select **Ok** to continue.

3 Select **Back** to return to the RoamAnywhere Client main screen.

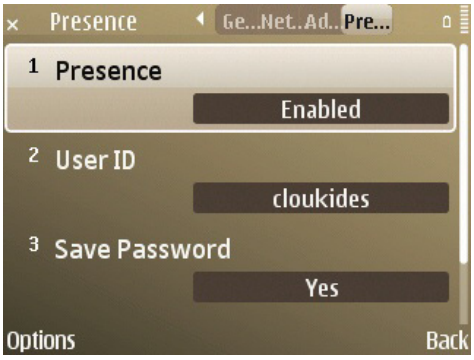
8.5 Changing Presence Preferences

You can perform the following tasks when changing RoamAnywhere Client Presence preferences:

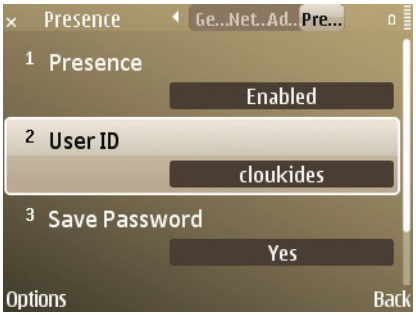
- Enable or disable **Presence**.
- Change the Presence **User ID**.
- Specify to save the Presence user ID's **Password**.
- Enable/Disable Instant Message alerts.

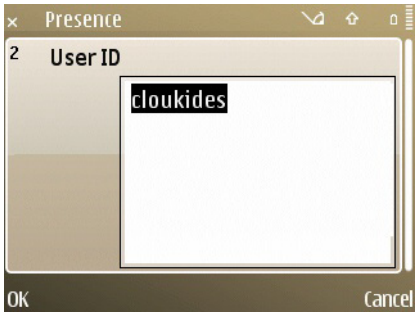
To access Presence preferences:

1. From the RoamAnywhere Client, select **Options > Preferences**. Use the right scroll key to advance to **Presence** preferences.
2. To enable or disable Presence, select **Presence** and use the center key to toggle between **Enabled** and **Disabled**.



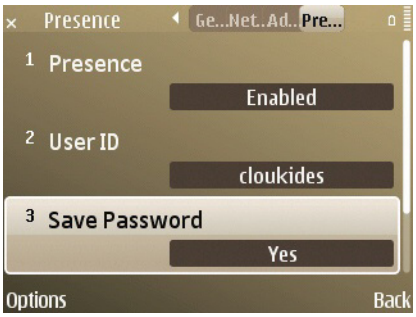
3. To change the User ID, select **User ID** and press the center button to select the field.



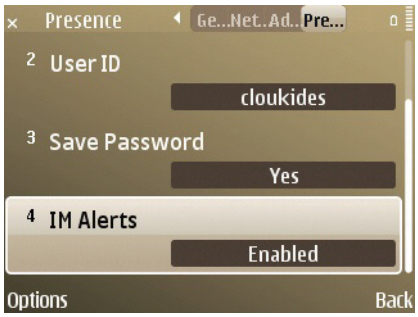


4. Enter the new **User ID** in the field. Select **OK** to be prompted to enter a password and continue, or **Cancel** to exit this screen without saving any changes.

5 To specify if the user's password is saved, select **Save Password** and use the center key to toggle between **Yes** and **No**.



6 To enable/disable the audible tone when an Instant Messages pops up, select IM Alerts. Use the center key to toggle between **Enable** and **Disable**. The default is Enable.

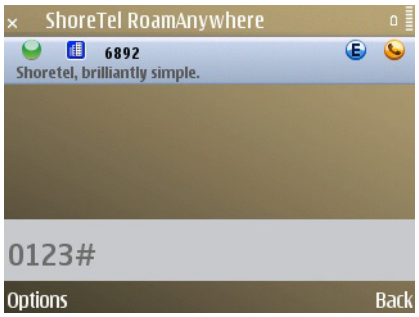


8.6 Uploading Logs to the ShoreTel Mobility Router

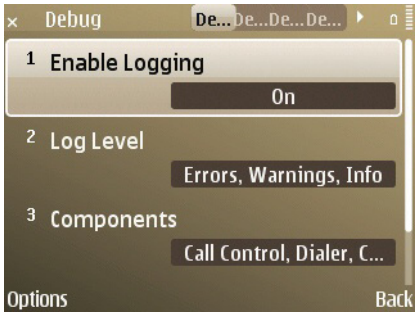
Logs can be collected while making and receiving calls. If a problem occurs, the logs, along with a short description of the problem, can then be uploaded to the Mobility Router for evaluation.

NOTE A Wi-Fi or cell-data connection is required for this feature.

1. On the RoamAnywhere Client screen, enter **0123#** SEND to display the hidden **Debug** screen.



2. Set the following parameters on the Debug screen:
   - Enable Logging: **On**
   - Log Level: **Errors**, **Warnings**, **Info**
   - Components: **Call Control**, **Client**, **Comm Mgr**, **Trans Mgr**, **Config Mgr**, **FPData Mgr**, **Directory**
   - SipLog: **On**

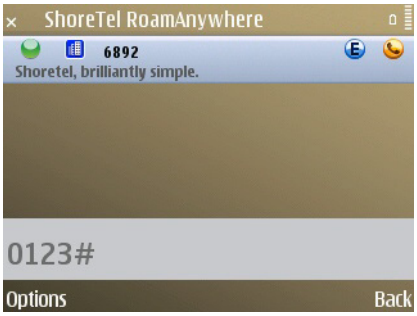


3. Select **Back** to return to the main client screen. The client logs are now enabled for all calls made on this device.

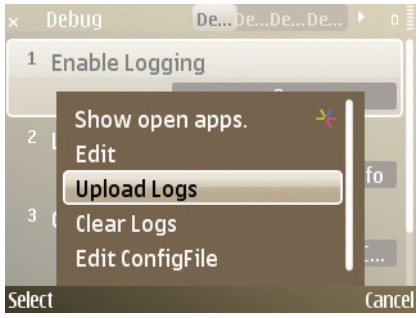
8.6.1 Uploading Logs

You can upload various types of logs to the ShoreTel Mobility Router.

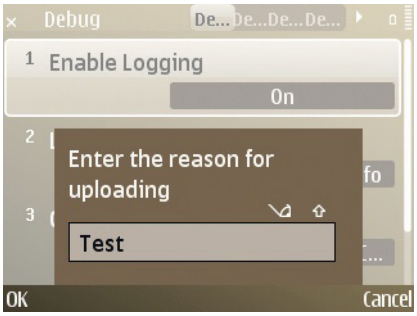
1 On the RoamAnywhere Client screen, enter **0123#** SEND to display the hidden **Debug** screen.



2 Select **Options** > **Upload Logs**.

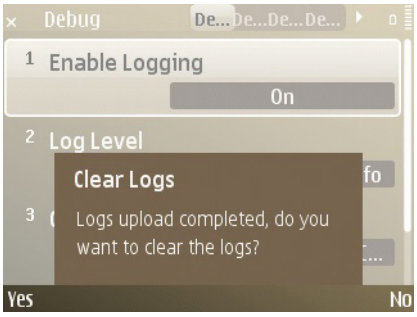


3 Optionally, enter a brief description of the nature of the error in the popup box.



4 Select **OK** to continue. The log is sent.

5 A prompt displays asking if you want to clear the log from the client. Select **Yes** or **No**.



6 Select **Back** to return to the main Client menu.

NOTE Optionally, you may send a separate email to your support organization with your name and the statistics of the error, including what happened, time, of day, etc.